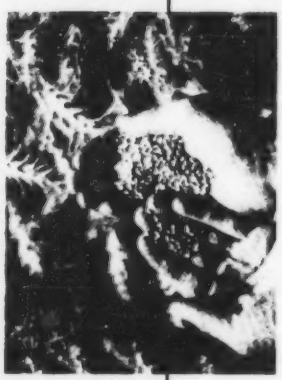
Manitoba Agriculture and Food

Program & Policy Analysis

2000

Manitoba Grains & Oilseeds Industry Profiles



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N/A = not available

Data sources: *Agriculture and Agri-Food Canada*
Canadian Grain Commission
Manitoba Agriculture and Food
Statistics Canada

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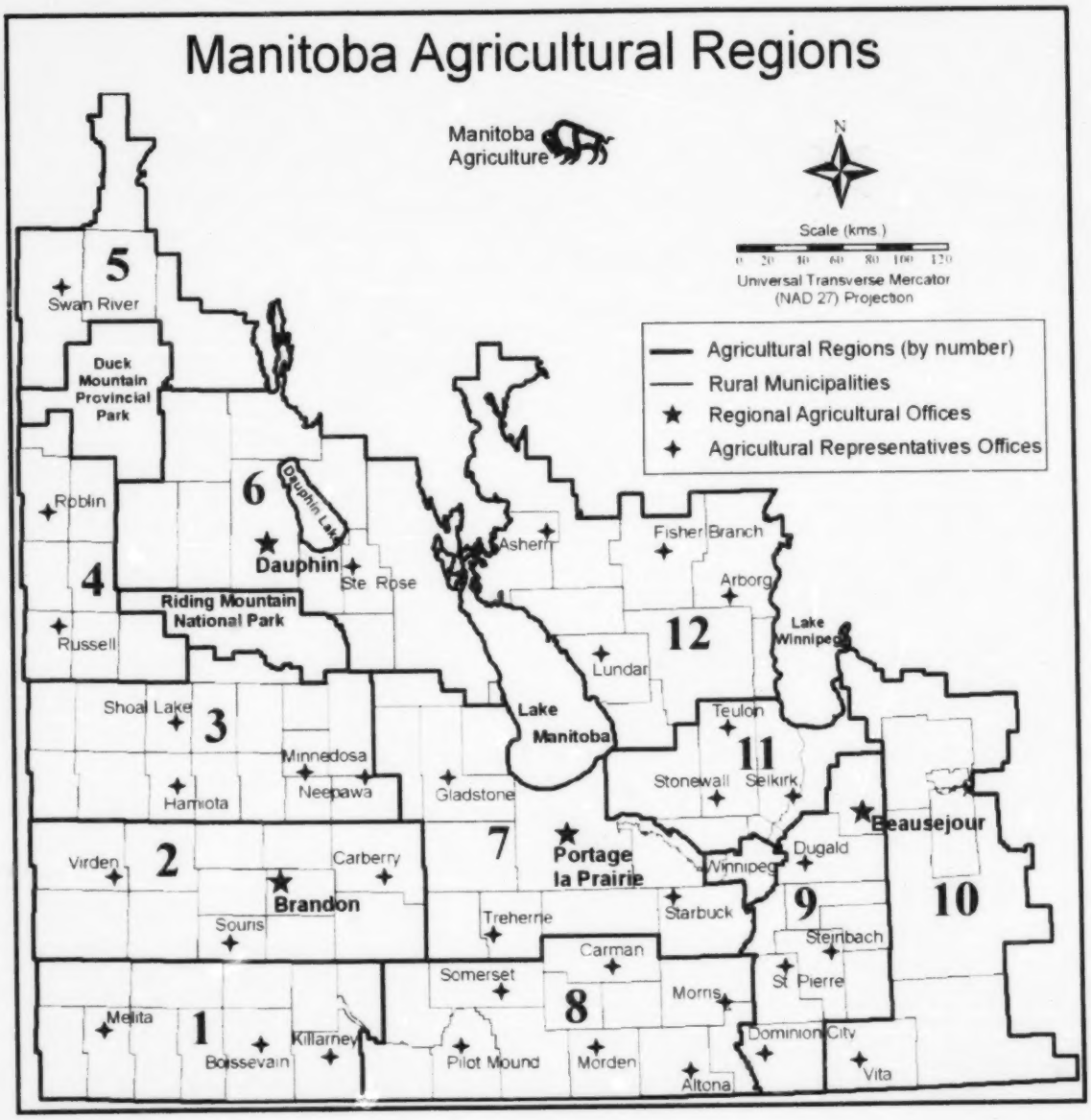


Administrative Region Name	Agricultural Region Numbers
Southwest	1, 2, 3
Northwest	4, 5, 6
Central	7, 8
Eastern/Interlake	9, 10, 11, 12

WHEAT SECTOR

WHEAT SECTOR PROFILE

Production:

The area seeded to wheat in Manitoba peaked in 1990 at 5.46 million acres, of which 5.45 million acres were harvested. The 1990 wheat production of 216.2 million bushels was also a record. Over the next five years, wheat plantings decreased in response to relatively low prices. Seeded and harvested areas rose to 4.23 million acres and 4.20 million acres respectively in 1996 after prices improved significantly in 1994/95, but fell to 3.24 million acres in 1998 when prices dropped in late 1996 and again in 1997. Due to excess soil moisture, the 1999 area seeded to wheat declined to 3.18 million acres, but seeded and harvested areas rose back to 3.91 million acres and 3.89 million acres respectively in 2000.

The total value of the Manitoba wheat crop was highest in 1985, at $757.8 million, but dropped to a twenty-year low of $373.0 million in 1999. In 2000, the value of wheat production increased by 37 percent over 1999 to $511.8 million, making wheat once again the most valuable crop in the province. Despite occupying the largest area of any annual crop in Manitoba, wheat was the second most valuable crop in the province after canola in 1997, 1998 and 1999.

Production of wheat was 156.8 million bushels in 2000, up from 116.1 million bushels in 1999. Manitoba contributed 15.9 percent of total Canadian wheat production in 2000, up from 11.8 percent in 1999.

Yields averaged 40.3 bushels per acre in 2000 compared to a 10-year average of 35.0 bushels per acre and 36.9 bushels per acre in 1999. The largest average yield on record was 41.4 bushels per acre in 1992.

About 88 percent of Manitoba's 2000 wheat crop was Hard Red Spring wheat, 4.3 percent was Winter wheat, about 1.3 percent was Prairie Spring, over 2.1 percent was Extra Strong, 3.3 percent was Durum, only 0.1 percent was Soft White Spring wheat and 0.7 percent were other varieties.

The late planting and harvesting of the 2000 crop as well as downgrading due to fusarium resulted in a small portion of Manitoba's wheat crop grading 1 CW. The average protein content was about 14.2 percent for Hard Red Spring wheat and 13.6 percent for Durum, an improvement from the previous year.

Average wheat prices rose from $2.85 per bushel in 1993 to a record $5.60 per bushel for the 1995 crop, but fell over the next four years to $3.20 per bushel in 1999. In 2000, average wheat prices rose slightly to $3.26 per bushel.

Estimated farm expenses for wheat production increased from $147.28 to $168.06 per acre from 1992 to 1996 but declined to $161.20 per acre in 1997. These expenses rose to $172.64 per acre in 1999 and fell to $168.74 in 2000. Estimated farm expenses comprise operating, labour and fixed costs.

Annual cash receipts from the sector showed an upswing from $426.8 million in 1992 to $675.8 million in 1996, but fell to $477.0 million in 1998. Farm cash receipts for wheat declined by 10 percent from $493.5 million in 1999 to $443.3 million in 2000. Manitoba's contribution to Canadian wheat receipts fell from 15.5 percent in 1999 to 14.4 percent in 2000.

Marketing:

Wheat marketings increased from 104.0 million bushels in 1995/96 to 138.3 million bushels in 1996/97, fell to 102.7 million bushels in 1998/99, but rose to 128.9 million bushels in 2000/2001. Wheat carryover increased annually from 2.0 million bushels in 1997/98 to 9.6 million bushels at the end of the 2000/2001 crop year.

In 2000, there were seven classes of Canadian wheat offered on the world market. *Canada Western Red Spring (CWRS) Wheat* is a hard wheat with superior milling and baking quality offered at various guaranteed levels of protein content, while *Canada Western Red Winter (CWRW) Wheat* is also a hard wheat with excellent milling quality used for products such as French bread, flat bread and steamed bread and certain types of noodles. *Canada Western Amber Durum (CWAD) Wheat* produces a high yield of semolina with excellent pasta-making quality. *Canada Prairie Spring Red (CPSR) Wheat* is used for a wide range of products, such as hearth breads, flat breads, steamed breads and noodles. *Canada Prairie Spring White (CPSW) Wheat*, a medium strength wheat, can be used for flat breads, noodles and chapattis. *Canada Western Extra Strong (CWES) Wheat* has extra gluten suitable for blending purposes and for the production of hearth and pan breads. *Canada Western Soft White Spring (CWSWS) Wheat* is a soft wheat of medium-to-low protein content used for flat breads, noodles, steamed breads, chapattis, cookies, cakes and pastry.

Processing:

Wheat processed into flour, cereal food and feed, pasta, bread and bakery products in 1997 (latest year available) comprised a large component of the total $510 million sales in these categories, compared to sales of $457.7 million and $356.8 million in the two previous years.

Manitoba has three flour mills, A.D.M, Milling Co. in Winnipeg, Harrison Milling and Grain Co. Ltd. in Holmfield and Prairie Flour Mills, constructed at Elie in 1997, the first new mill in the province for many years. These three mills and Pizzey's Milling and Baking Co. in Angusville as well as numerous bakeries employed over 1,000 people to produce an estimated $50 million worth of flour and cereals and $80 million of bread and bakery products in 2000. Local processors of fresh, frozen or dry pasta include Alfonso's Food Products Ltd. and Old Fashioned Noodle Products in Winnipeg and Ackron Egg Farms, Ltd. in Steinbach.

Grain is used to produce ethanol at a plant in Minnedosa, which provides mash for feed as by-product. The former Isobord Enterprises (sold to Dow Bio Products Ltd. in 2001) straw particle-board plant built at Elie normally utilises about 175,000 tons of straw per year from the surrounding area. However, straw purchases declined to 110,00 tons in 2000. The plant employed about 100 people when it became fully operational in 1998.

Trade:

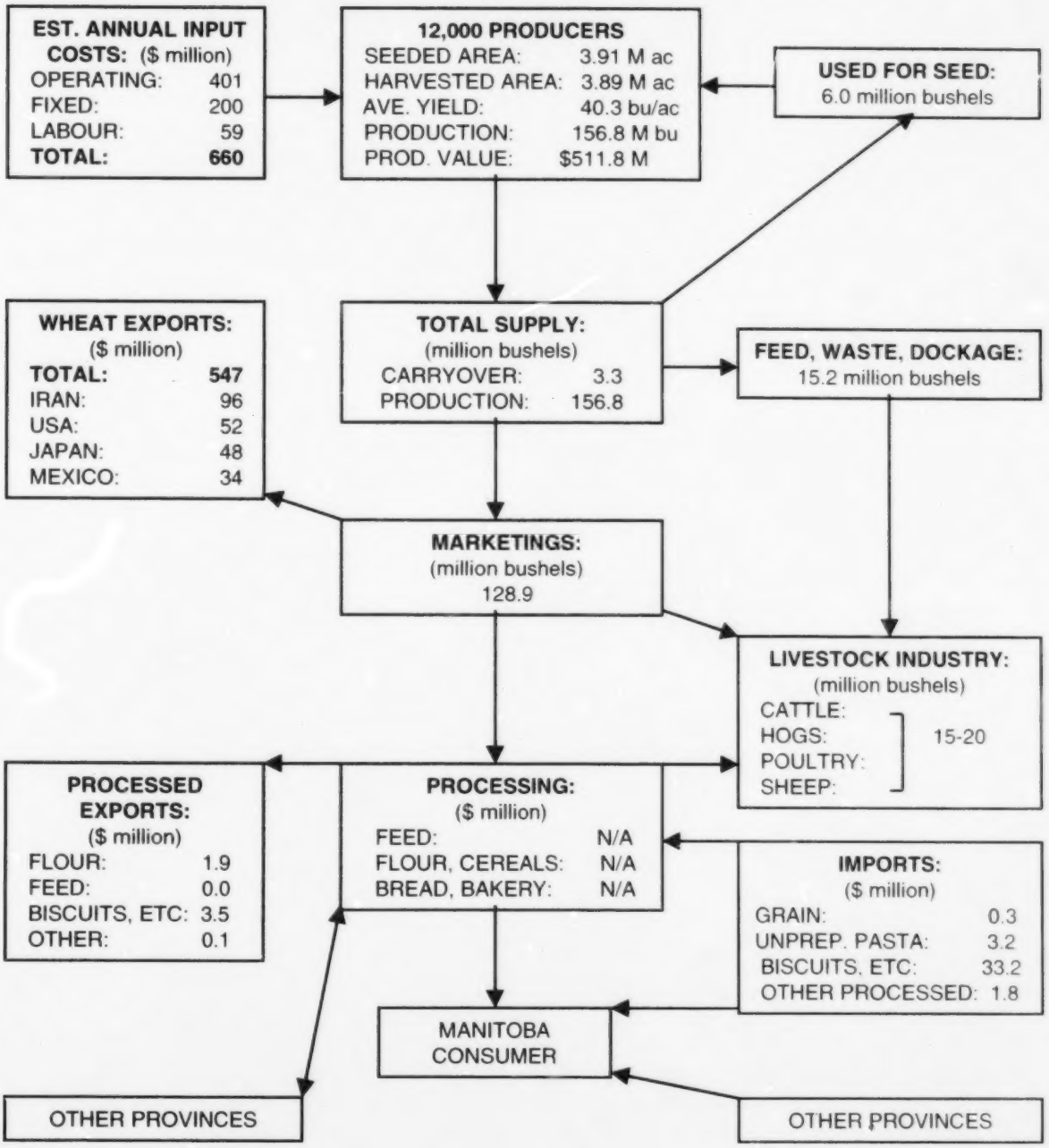
Manitoba wheat exports, sold to 71 other countries mostly in the unprocessed form, increased from $464.0 million in 1999 to $552.7 million in 2000. Approximately 42 percent of the province's wheat exports in 2000 were shipped to the United States, Iran, Japan and Mexico.

Imports of processed wheat products, such as unprepared pasta and baked goods, were valued at $38.5 million in 2000, down from $41.0 million in 1999.

WHEAT AND WHEAT PRODUCTS SECTOR

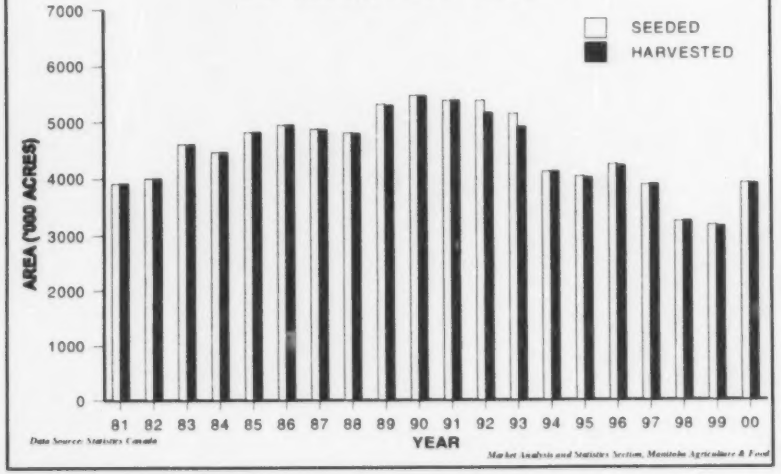
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	12,000	10,000	9,800	12,000	122
CROP PRODUCTION:					
Seeded Area ('000 acres):	3,880	3,240	3,175	3,905	123
% of Canada	13.7	12.1	12.3	14.2	
Harvested Area ('000 acres):	3,880	3,230	3,145	3,885	124
Yield/acre (bushels):	31.7	36.6	36.9	40.3	108
Production (million bushels):	123.1	118.3	116.1	156.8	135
% of Canada	13.8	13.2	11.8	15.9	
Average Price ($/bu):	3.98	3.92	3.20	3.26	102
VALUE OF PRODUCTION ($ million):	490.3	463.4	373.0	511.8	137
ESTIMATED TOTAL EXPENSES ($/acre):	161.20	164.82	172.64	168.74	98
CASH RECEIPTS ($ million):	662.8	477.0	493.5	443.3	90
% of Canada	14.7	14.2	15.5	14.4	
EST. QUALITY (% protein content):	**97/98**	**98/99**	**99/2000**	**2000/01**	
All CW Red Spring (CWRS):	14.9	14.6	14.2	14.2	100
1CWRS	14.7	14.3	14.1	14.1	100
2CWRS	15.0	14.7	14.2	14.3	101
3CWRS	14.7	14.6	14.2	14.1	99
CW Feed	15.4	14.9	N/A	N/A	
All CW Extra Strong (CWES)	13.3	13.0	N/A	N/A	
All Canada Prairie Spring Red (CPS)	12.2	N/A	N/A	N/A	
All CW Red Winter Wheat (CWRW)	11.7	N/A	N/A	N/A	
All CW Amber Durum (CWAD)	14.1	13.1	N/A	N/A	
CROP DISPOSITION (million bu):	128.2	120.3	119.4	160.1	134
Marketings	108.3	101.1	103.4	128.9	125
Seed Requirements	5.0	4.9	6.0	6.4	107
Feed, Waste & Dockage	12.9	11.0	6.6	15.2	230
Carryover, July 31	2.0	3.3	3.3	9.6	291
PROCESSING ($ million):					
Flour, Cereals, etc	50	50	N/A		
Bread, Bakery products	82.2	80	N/A		
EXPORTS ($ million):	770.0	455.9	464.0	552.7	119
Unprocessed	763.0	454.6	458.9	547.2	119
Processed	7.0	1.3	5.1	5.5	108
IMPORTS ($ million):	26.3	30.1	41.0	38.5	94
Unprocessed	0.14	0.001	0.001	0.3	-
Processed	26.2	30.1	41.0	38.2	93

WHEAT INDUSTRY CHART, 2000

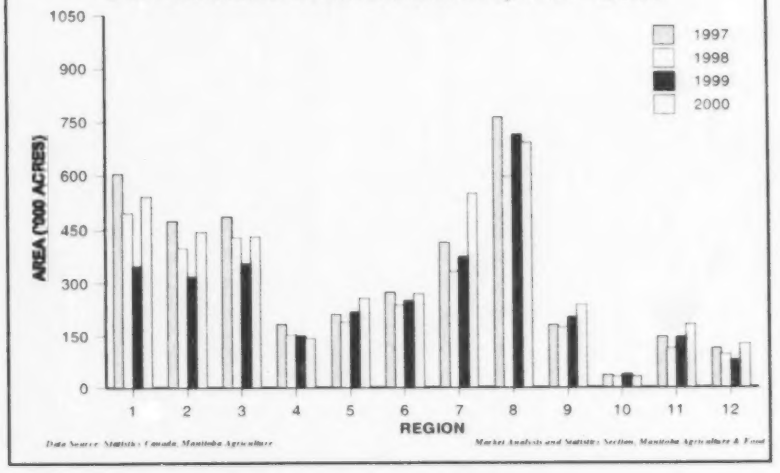


DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

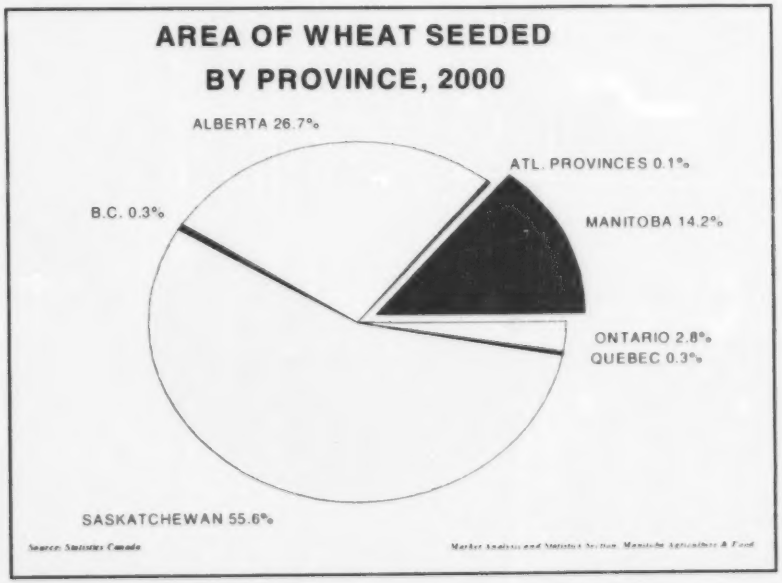
SEEDED & HARVESTED AREA OF WHEAT BY YEAR, 1981- 2000



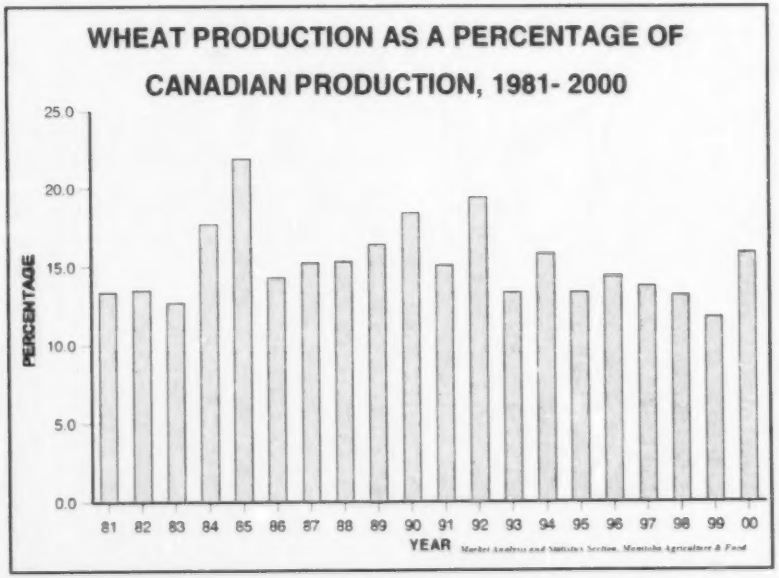
SEEDED AREA OF WHEAT BY AGRICULTURAL REGION, 1997- 2000

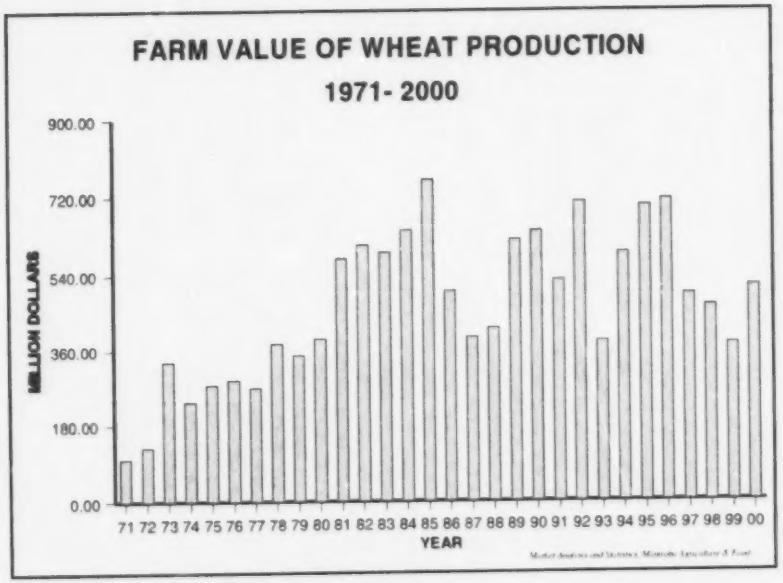


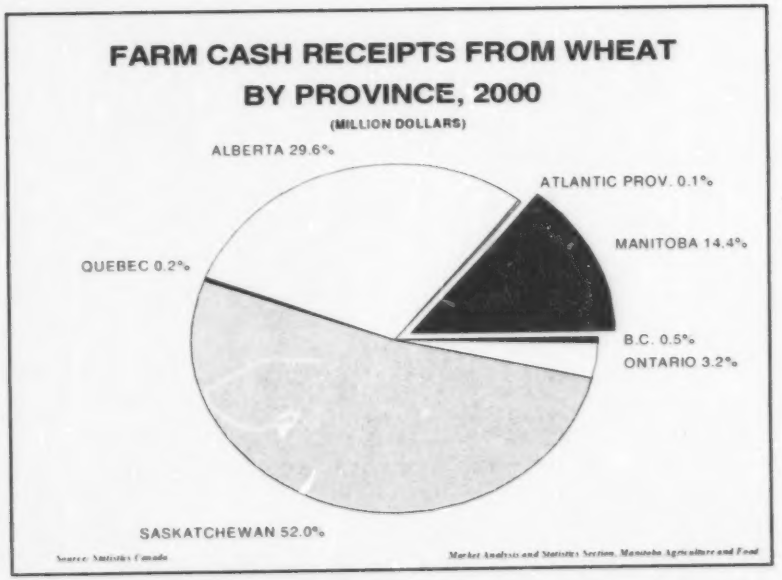
AREA OF WHEAT SEEDED BY PROVINCE, 2000

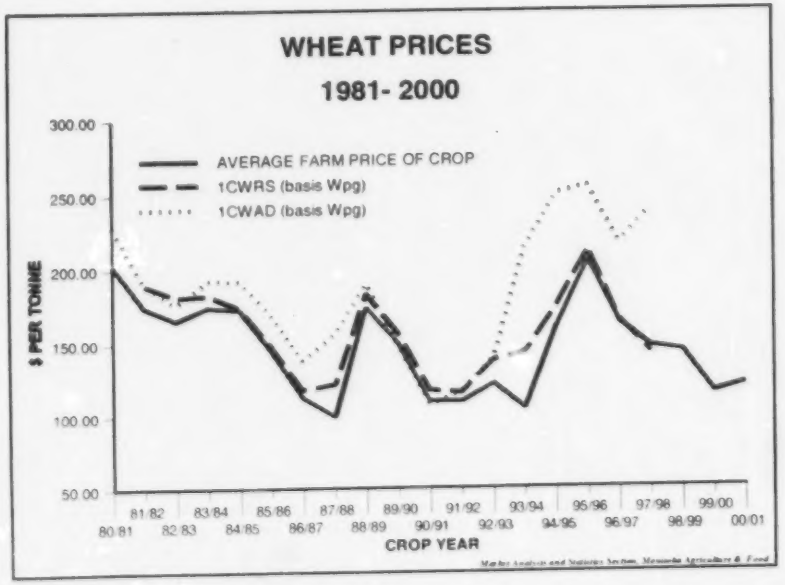


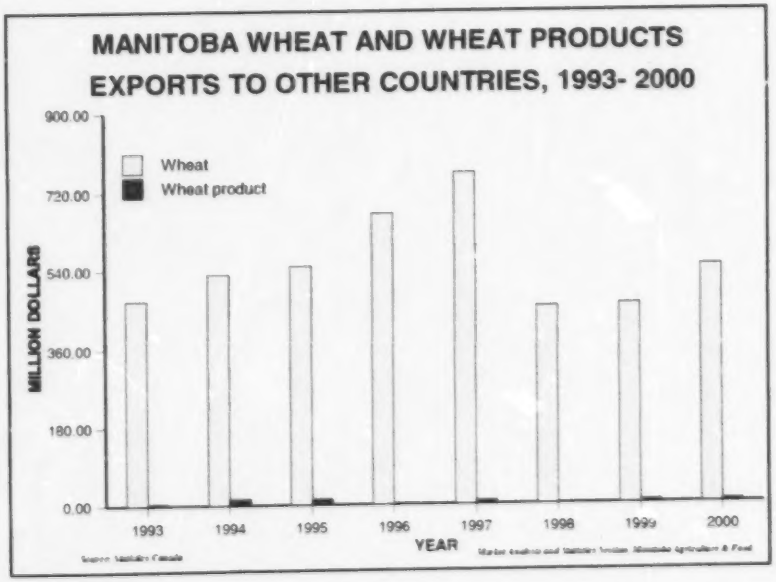
WHEAT PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1981- 2000

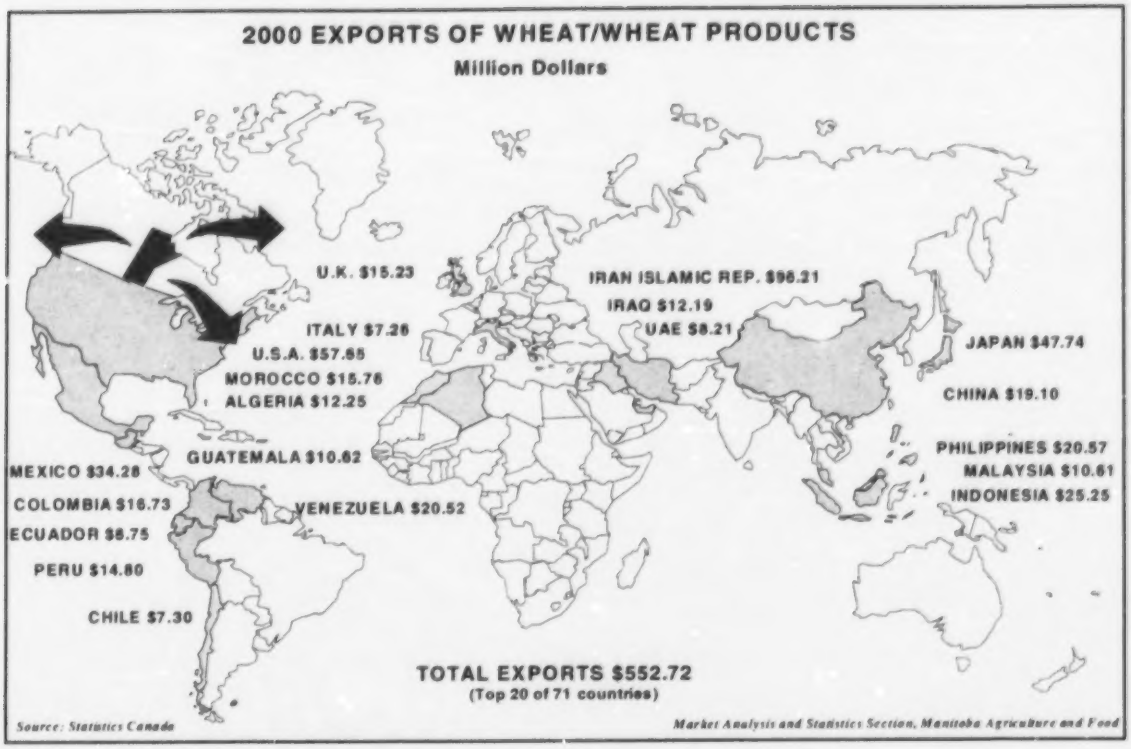



FARM VALUE OF WHEAT PRODUCTION
1971- 2000
MILLION DOLLARS
900.00
720.00
540.00
360.00
180.00
0.00
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


FARM CASH RECEIPTS FROM WHEAT
BY PROVINCE, 2000
(MILLION DOLLARS)
ALBERTA 29.6%
ATLANTIC PROV. 0.1%
MANITOBA 14.4%
QUEBEC 0.2%
B.C. 0.5%
ONTARIO 3.2%
SASKATCHEWAN 52.0%


WHEAT PRICES
1981- 2000
$ PER TONNE
300.00
250.00
200.00
150.00
100.00
50.00
AVERAGE FARM PRICE OF CROP
1CWRS (basis Wpg)
1CWAD (basis Wpg)
80/81 81/82 82/83 83/84 84/85 85/86 86/87 87/88 88/89 89/90 90/91 91/92 92/93 93/94 94/95 95/96 96/97 97/98 98/99 99/00 00/01
CROP YEAR


MANITOBA WHEAT AND WHEAT PRODUCTS
EXPORTS TO OTHER COUNTRIES, 1993- 2000
MILLION DOLLARS
900.00
720.00
540.00
360.00
180.00
0.00
Wheat
Wheat product
1993 1994 1995 1996 1997 1998 1999 2000
YEAR


2000 EXPORTS OF WHEAT/WHEAT PRODUCTS
Million Dollars
U.K. $15.23
ITALY $7.26
U.S.A. $57.85
MOROCCO $15.76
ALGERIA $12.25
GUATEMALA $10.62
MEXICO $34.28
COLOMBIA $16.73
ECUADOR $8.75
PERU $14.80
CHILE $7.30
VENEZUELA $20.52
IRAN ISLAMIC REP. $96.21
IRAQ $12.19
UAE $8.21
JAPAN $47.74
CHINA $19.10
PHILIPPINES $20.57
MALAYSIA $10.61
INDONESIA $25.25
TOTAL EXPORTS $552.72
(Top 20 of 71 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

2000 IMPORTS OF WHEAT/WHEAT PRODUCTS
Million Dollars
U.K. $0.004
FRANCE $0.0006
ITALY $0.102
U.S.A. $38.28
CAYMAN IS. $0.002
MEXICO $0.003
PERU $0.002
CHILE $0.0000
ARGENTINA $0.0007
GERMANY $0.086
TURKEY $0.0004
THAILAND $0.0006
S. KOREA $0.0002
CHINA $ 0.0001
TOTAL IMPORTS $38.48
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

BARLEY SECTOR

BARLEY SECTOR PROFILE

Production:

The area seeded to barley in Manitoba peaked in 1981 at 2.4 million acres, of which 2.35 million acres were harvested. Barley production reached a record level of 116 million bushels in 1985, when the average yield was the second highest on record at 62.7 bushels per acre. The area planted to barley decreased in the late 1980s and 1990s to a 32-year low of 1.06 million acres in 1999. In 2000, the area seeded to barley increased by 17.9 percent over 1999 to 1.25 million acres.

The area of barley harvested in 2000 was 1.19 million acres, up from one million acres in 1999. Almost 74.5 million bushels were produced in 2000, a rise of 33.5 percent from the year before, but 35.8 percent below the record 1985 level. Manitoba contributed 12.0 percent of total Canadian barley production in 2000, up from 9.2 percent in 1999.

Yields averaged 62.6 bushels per acre in 2000, an increase of 12.2 percent from the 1999 yield of 55.8 bushels per acre and 7.4 percent above the 10-year average of 58.3 bushels per acre. The largest average yield on record was 68.6 bushels per acre in 1992.

Average barley prices, which ranged from $1.75 to $3.55 per bushel in the past ten years, were record high in 1995. Average prices for the 2000 barley crop rose to $2.02 per bushel from $1.95 per bushel in 1999.

The total value of the Manitoba barley crop was highest in 1981, at $277.3 million, but dropped to a 22-year low of $99.3 million in 1993. Higher prices increased the value of the crop in 1994 and 1995. The decrease in production in 1999 lowered the value of the barley crop by over 29 percent to $108.8 million, but the larger crop and higher prices in 2000 resulted in a 38.2 percent increase in the value of the crop to $150.4 million.

Estimated total farm expenses for barley production rose to $161.79 per acre in 1996, declined to $158.62 per acre in 1997, rose again in 1998 and 1999, but decreased to $162.53 per acre in 2000. Total expenses included operating, labour and fixed costs.

Marketing:

Annual cash receipts from barley marketings fluctuated over the past six years, increasing from $57.8 million in 1994 to $94.9 million in 1996, declining to $52.1 million in 1998 and $38.4 million in 1999, but rising to $44.7 million in 2000. Down from earlier years, Manitoba's contribution to Canadian barley receipts fell from 13.2 percent in 1993 to between 7.7 percent and 10.2 percent for the next seven years.

Most of the 2000 crop was feed quality and fed on farm or marketed "off-Board". Malting barley selections declined in 1997, 1998 and 1999, but rose slightly in 2000. Manitoba Designated barley comprised 79 percent of the barley marketed to the Canadian Wheat Board in 2000/01, down from 82 percent a year earlier, and about 13 percent of all barley marketed in 2000/01.

Barley marketings decreased from 39.8 million bushels in 1996/97 to 18.8 million bushels in 1999/2000, but increased to 30.0 million bushels in 2000/01. Over the same three-year period, carryover fell from 13.8 million bushels to 8.3 million bushels, but rose to 11.5 million bushels in 2000/01. In 2000, about 18.8 percent of the barley crop was planted to higher-yielding feed varieties, with about 7.3 percent to hulless types (2- and 6-Row), about 55.7 percent to 6-Row and 18.2 percent to 2-Row barley. The 6-Row blue aleurone types are mainly for the domestic and U.S. markets. The portion sown to hulless

barley, which has superior, lower fibre, feed qualities has varied between 7.3 and 8.6 percent over the past few years. Manitoba farmers deliver some feed barley to Saskatchewan and grain and feed companies import barley from Saskatchewan into Manitoba.

Processing:

Over two-thirds of the barley produced in Manitoba in 2000 was used for domestic animal feed. About 6.2 percent of Manitoba's 2000 barley crop was selected for use by either the domestic or foreign food and beverage industries. Some of the selected or designated barley is processed into food, such as pot or pearl barley, the remainder being used for malt. Manitoba has one major maltster, Dominion Malting Ltd. Malt is either used by the province's breweries, such as Molson Canada and Fort Garry Brewing Co. Ltd., or exported.

Trade:

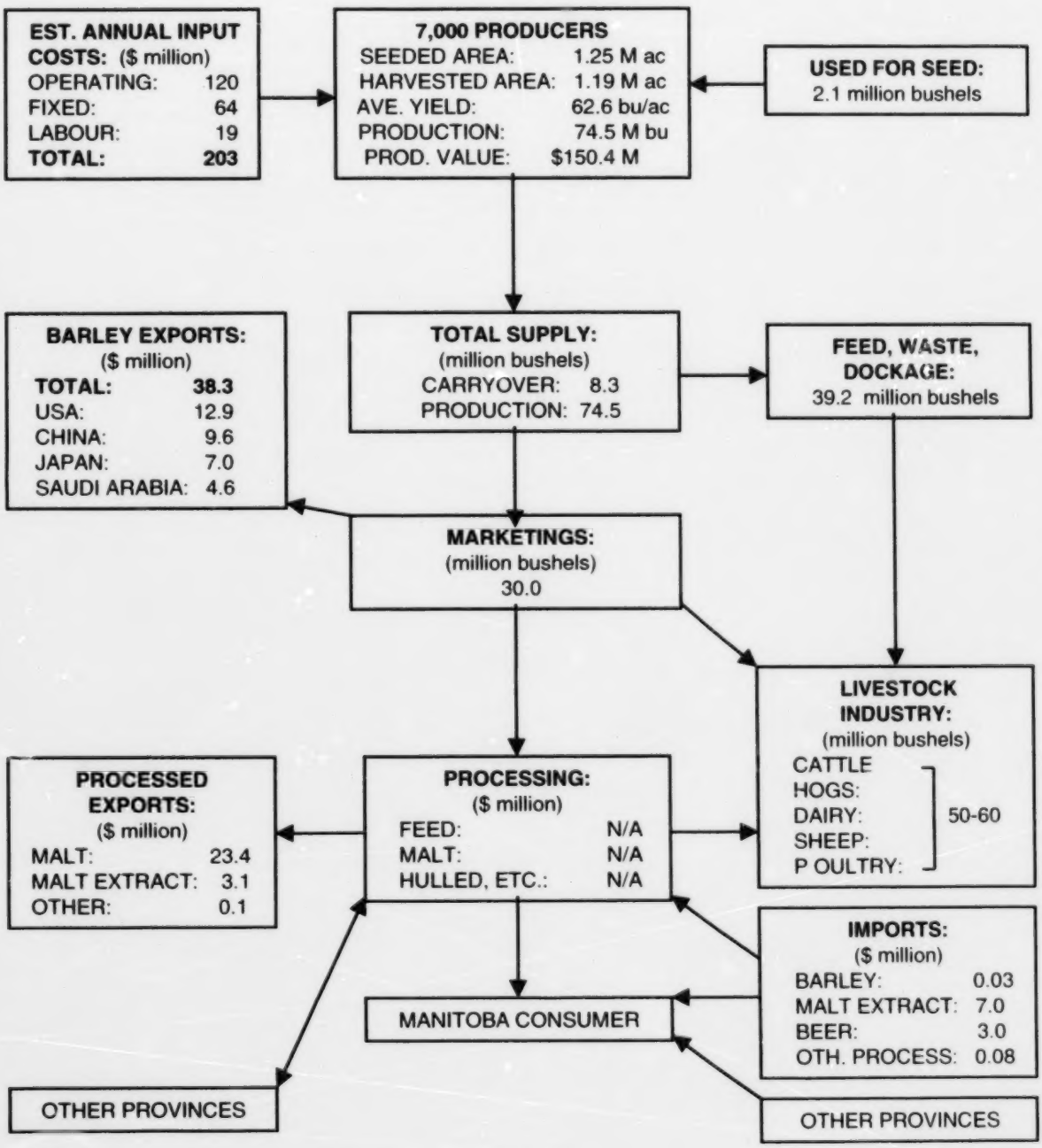
Manitoba barley exports to other countries, mainly malting barley and sold mostly in the unprocessed form, dropped from $73.7 million in 1997 to $27.1 million in 1999, but increased to $38.3 million in 2000. Almost 90 percent of the province's barley exports were shipped to the United States, China, Japan and Saudi Arabia in 2000 with smaller amounts going to 14 other countries. About $23.4 million of Manitoba-produced malt and $3.1 million of malt extract were exported in 2000.

About $10.4 million of barley and malt were imported into Manitoba in 2000.

BARLEY AND BARLEY PRODUCTS SECTOR

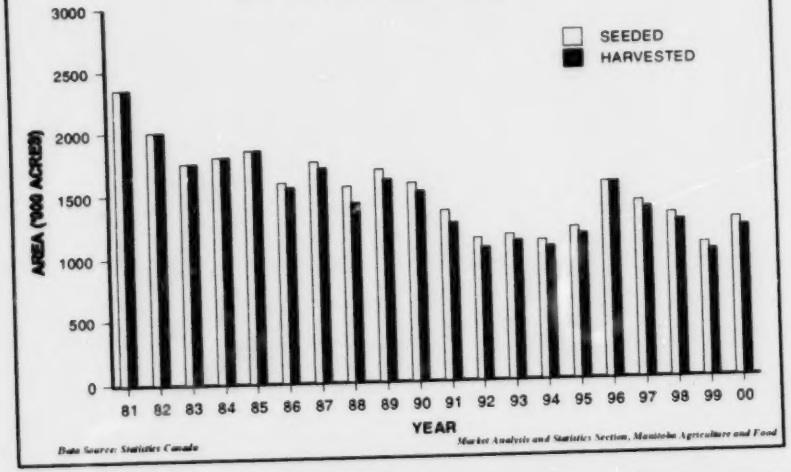
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	8,500	8,000	7,000	7,000	100
CROP PRODUCTION:					
Seeded Area('000 acres):	1,400	1,300	1,060	1,250	118
% of Canada	11.3	11.4	9.7	10.0	
Harvested Area ('000 acres):	1,350	1,240	1,000	1,190	119
Yield/acre (bushels)	57.3	60.4	55.8	62.6	112
Production (million bu):	77.4	74.9	55.8	74.5	134
% of Canada	12.3	12.8	9.2	12.0	
Average Price ($/bu):	2.25	2.05	1.95	2.02	104
VALUE OF PRODUCTION ($ million):	173.9	153.8	108.8	150.4	138
EST. TOTAL EXPENSES ($/acre):	158.62	160.99	166.30	162.53	98
CASH RECEIPTS ($ million):	86.9	52.1	38.4	44.7	116
% of Canada	10.2	9.1	7.7	7.9	
PLANTING DISTRIBUTION (%):	**97/98**	**98/99**	**99/2000**	**2000/01**	
High-yield Feed	N/A	N/A	23.3	18.8	81
Hulless (2- and 6-Row)	8.6	7.5	8.4	7.3	87
6-Row	77.7	79.6	55.0	55.7	101
2-Row	13.7	12.9	13.3	18.2	137
CROP DISPOSITION (million bu):	91.2	86.4	67.3	82.8	123
Marketings: - All Barley	26.5	21.4	18.8	30.0	160
- Feed Barley	19.7	16.5	14.7	25.4	173
- Designated Barley	6.8	4.9	4.1	4.6	112
Seed Requirements	2.2	1.8	2.1	2.1	100
Feed, Waste & Dockage	51.0	51.7	38.0	39.2	103
Carryover, July 31	11.5	11.5	8.3	11.5	139
EXPORTS ($ million):	96.5	54.2	50.3	64.9	138
Unprocessed	73.7	33.4	27.1	38.3	141
Processed	22.8	20.8	23.2	26.6	115
IMPORTS ($ million):	3.3	8.9	10.4	10.4	100
Unprocessed	0.2	0.8	0.2	0.3	150
Processed	3.1	8.1	10.2	10.1	99

BARLEY INDUSTRY CHART, 2000



DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

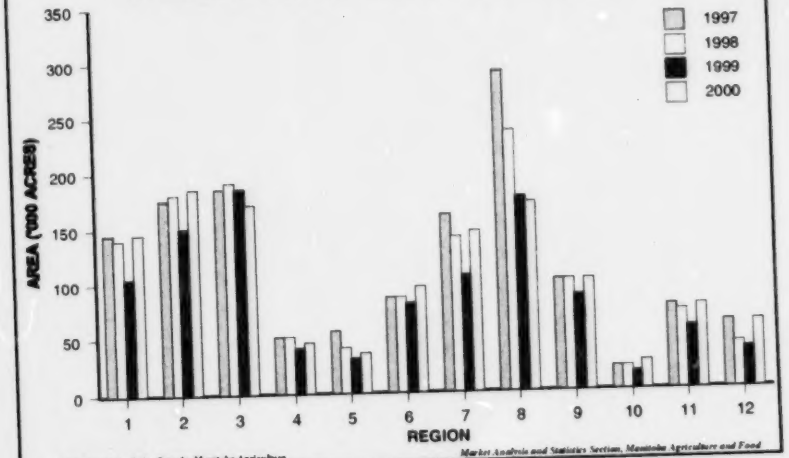
SEEDED & HARVESTED AREA OF BARLEY BY YEAR, 1981- 2000



Data Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture and Food

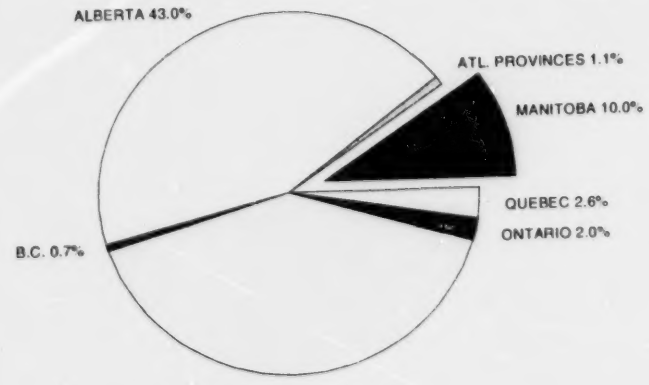
SEEDED AREA OF BARLEY BY AGRICULTURAL REGION, 1996- 2000



Data Source: Statistics Canada, Manitoba Agriculture

Market Analysis and Statistics Section, Manitoba Agriculture and Food

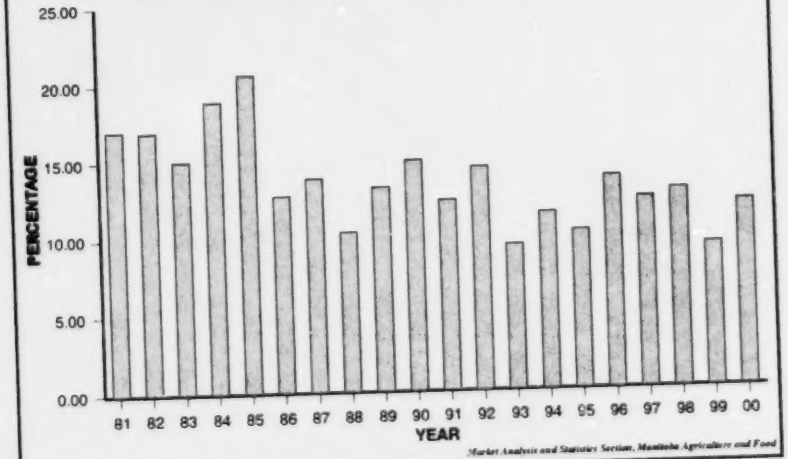
AREA OF BARLEY SEEDED BY PROVINCE, 2000



Source: Statistics Canada

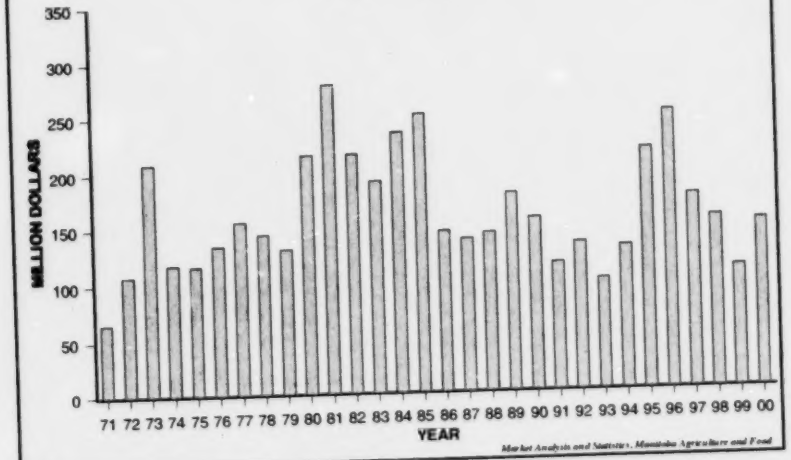
Market Analysis and Statistics Section, Manitoba Agriculture and Food

BARLEY PRODUCTION AS A PERCENTAGE OF CANADIAN PRODUCTION, 1981- 2000

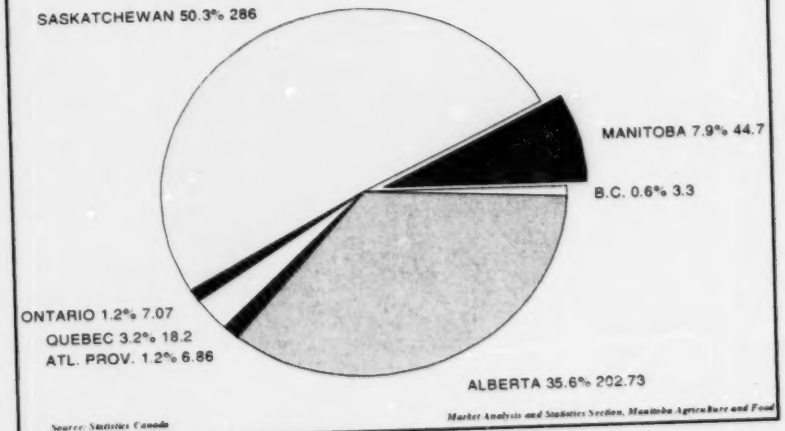


Market Analysis and Statistics Section, Manitoba Agriculture and Food

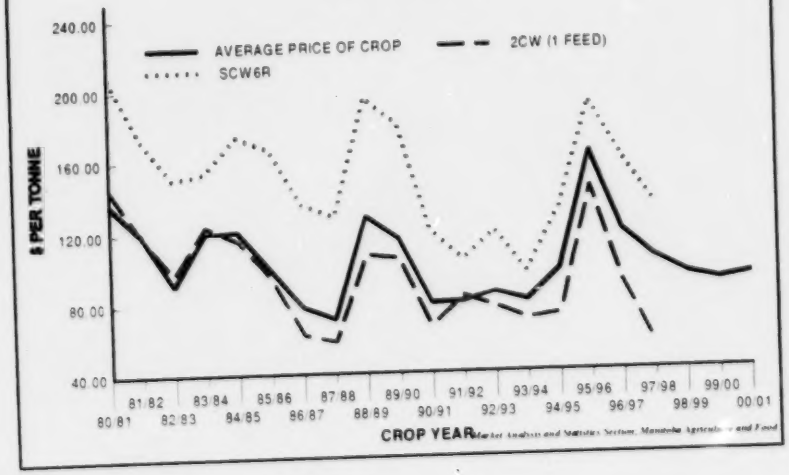
FARM VALUE OF BARLEY PRODUCTION
1971- 2000



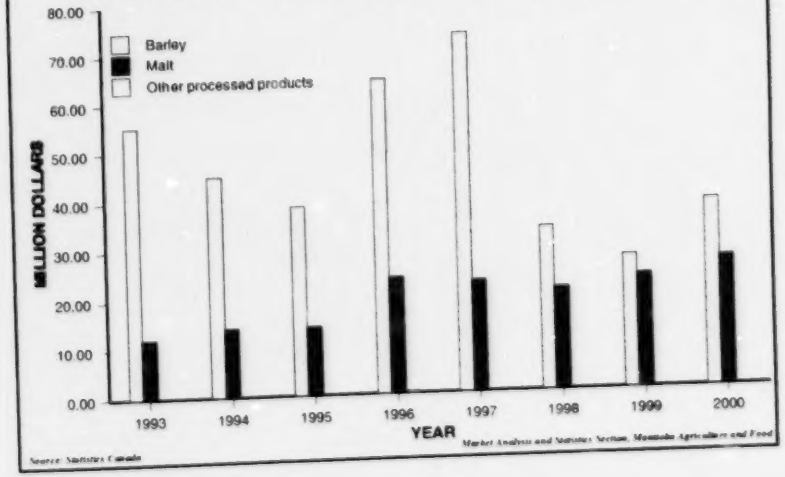
FARM CASH RECEIPTS FROM BARLEY BY PROVINCE, 2000
(MILLION DOLLARS)

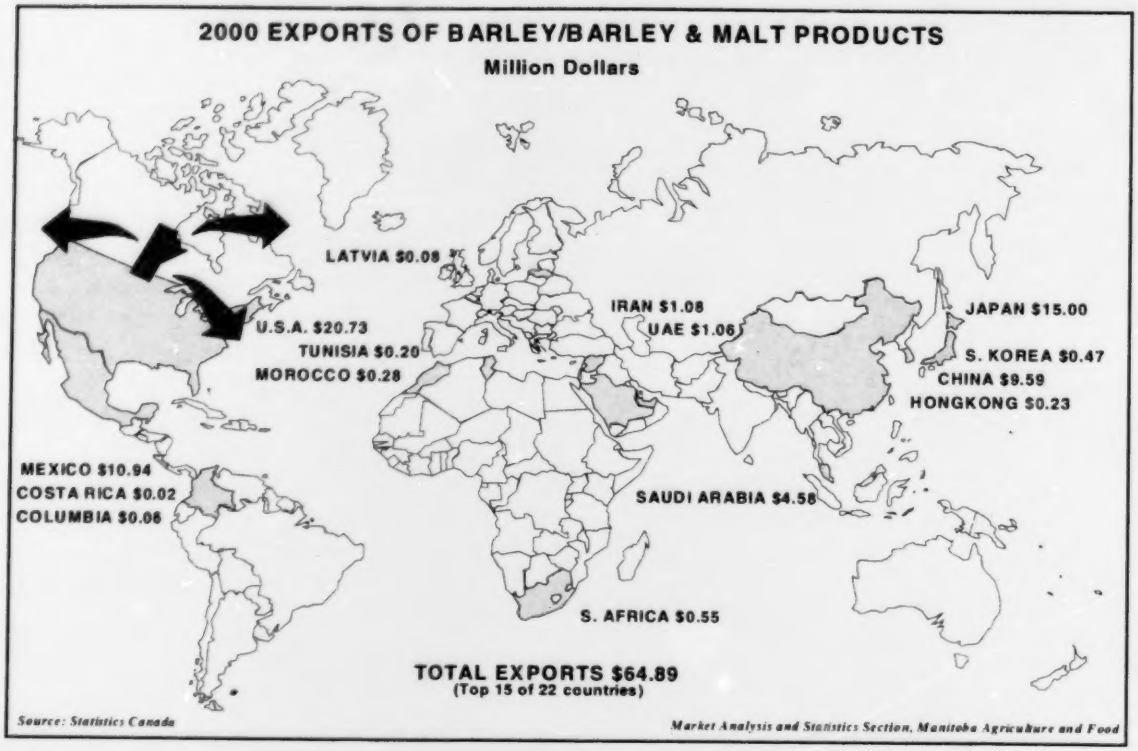


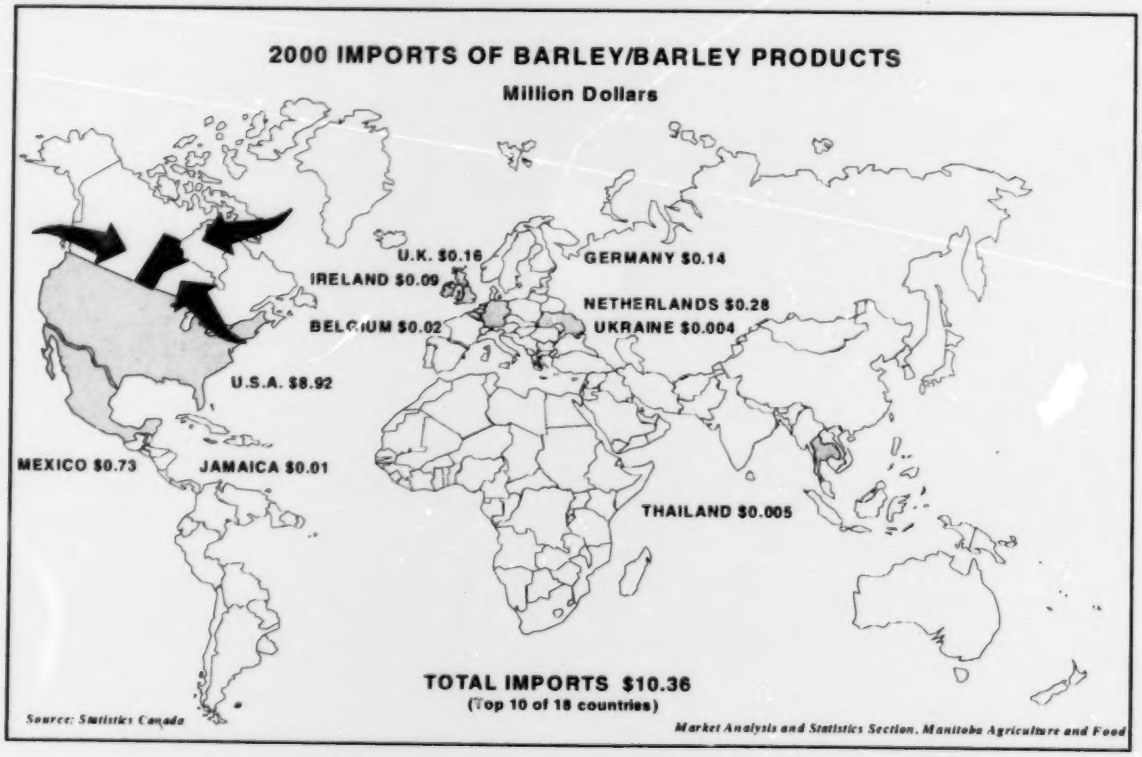
BARLEY PRICES
1981 - 2000



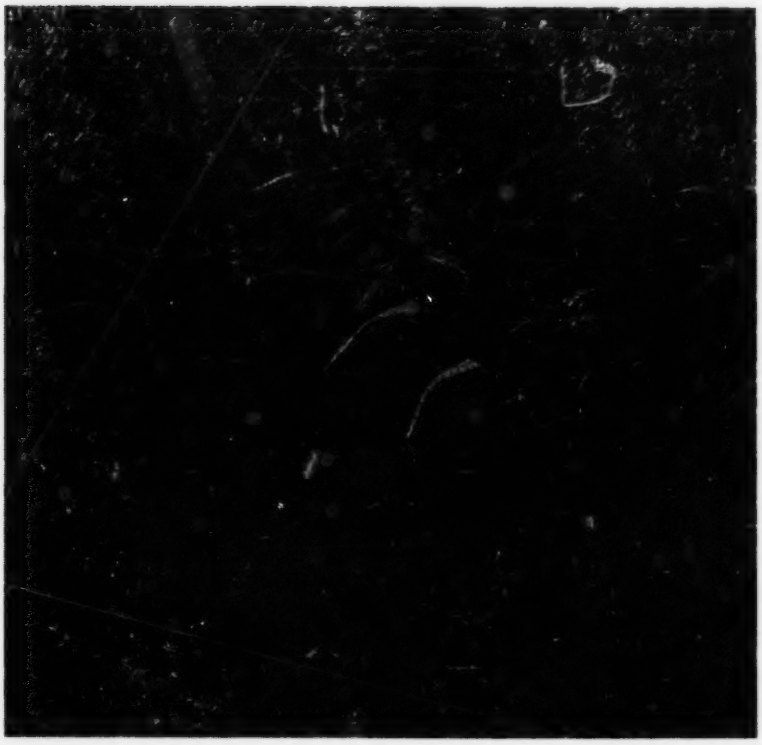
MANITOBA BARLEY AND PRODUCTS EXPORTS TO OTHER COUNTRIES, 1993 - 2000




2000 EXPORTS OF BARLEY/BARLEY & MALT PRODUCTS
Million Dollars
LATVIA $0.08
U.S.A. $20.73
TUNISIA $0.20
MOROCCO $0.28
IRAN $1.08
UAE $1.06
JAPAN $15.00
S. KOREA $0.47
CHINA $9.59
HONGKONG $0.23
MEXICO $10.94
COSTA RICA $0.02
COLUMBIA $0.06
SAUDI ARABIA $4.58
S. AFRICA $0.55
TOTAL EXPORTS $64.89
(Top 15 of 22 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF BARLEY/BARLEY PRODUCTS
Million Dollars
U.K. $0.16
IRELAND $0.09
BELGIUM $0.02
GERMANY $0.14
NETHERLANDS $0.28
UKRAINE $0.004
U.S.A. $8.92
MEXICO $0.73
JAMAICA $0.01
THAILAND $0.005
TOTAL IMPORTS $10.36
(Top 10 of 18 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

OAT SECTOR



OAT SECTOR PROFILE

Production:

The area of oats seeded and harvested in Manitoba was greatest in 1921 at 2.2 million acres. As the agricultural industry began to rely more on machinery and less on horses, the area of oats needed for animal feed declined over time. By 1991, only 384,000 acres were planted to oats, of which 270,000 acres were harvested for grain with the remainder being used for hay or silage. The popularity of oats for human consumption and pet food increased in the 1990s. Manitoba's oat plantings have shifted increasingly to new, very high-yielding varieties. In 2000, 950,000 acres of oats were seeded with 860,000 acres harvested for grain, up from 810,000 acres seeded and 730,000 acres harvested in 1999. From a peak production of 74.4 million bushels in 1922, oat production declined to 14.4 million bushels in 1991. The 2000 production of 65.9 million bushels was up by 19 percent from 1999. Manitoba contributed 30.0 percent of total Canadian oat production in 2000, up from 23.5 percent in 1999.

The average yield of 76.6 bushels per acre in 2000 was another new record, up from the previous record yield of 75.9 bushels per acre in 1999 and a 10-year average of 68.7 bushels per acre.

Average oat prices ranged from $1.30 to $2.25 per bushel over the past ten years. Prices were record high in 1988 at $2.33 per bushel. In recent years, prices decreased from $2.25 per bushel for the 1995 crop to $1.39 per bushel in 1999, but rose to $1.45 per bushel for the 2000 crop.

The total value of the Manitoba oat crop reached a record of $144.7 million in 1996, but the value in 2000 was $95.5 million. A 30-year low of $18.7 million occurred in 1991.

Estimated farm expenses for oat production, including operating, labour and fixed costs, rose from $140.51 per acre in 1997 to $150.85 per acre in 1999, but fell to $146.75 in 2000.

Marketing:

Annual cash receipts from the sector increased from $18.5 million in 1992 to a record $85.1 million in 1996. Farm cash receipts in 1999 and 2000 were $63.5 million and $67.6 million respectively. Manitoba's contribution to Canadian oat receipts rose from 18.9 percent in 1992 to 36.8 percent in 1999, but declined to 33.8 percent in 2000.

About 63 percent of oats produced in 2000 were Tan or high protein milling oats, 31 percent were White or pony/performance oats and 6 percent were other/general purpose oats.

Oat marketings rose to 46.7 million bushels in 1999/2000 and 51.4 million bushels in 2000/01. Oat carryover increased from 4.5 million bushels in 1997/98 to 9.7 million bushels at the end of the 1998/99 crop year, but was at 7.8 million bushels on July 31, 2001.

Processing:

Oats are processed by Can-Oat Milling Products, Inc., in Portage la Prairie, into flour, rolled oats, and oat bran. Emerson Milling processes oats into groats for high-quality pet feed.

Trade:

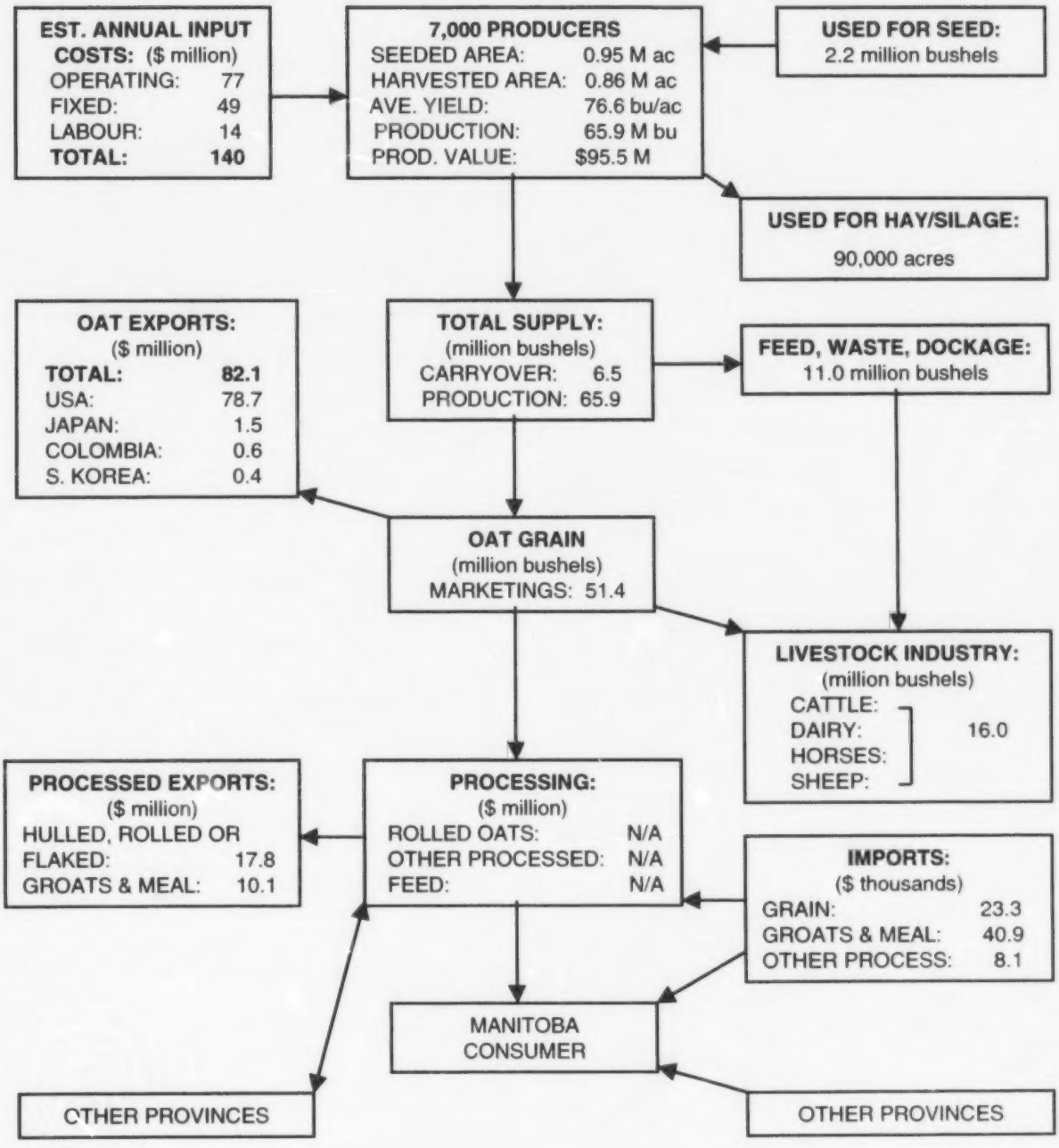
Unprocessed oat exports to other countries decreased in value from $89.5 million in 1997 to $66.0 million in 1999, but increased to $82.1 million in 2000. Manitoba oats have been increasingly popular for racehorses since the 1980s and more recently for milling, cereal and pet food products in the United States. Over 95 percent of the province's oat exports were shipped to the U.S.A. in 2000 with smaller amounts going to Japan, Colombia, South Korea and 17 other countries. Oat flour, rolled oats, oat groats and oat bran exports totalled $27.9 million in 2000, most of which were sold to the U.S.A.

Imports of oats and processed oat products were valued at $72,300 in 2000, up from $36,900 in 1999, although a significant decrease from $506,700 in 1996.

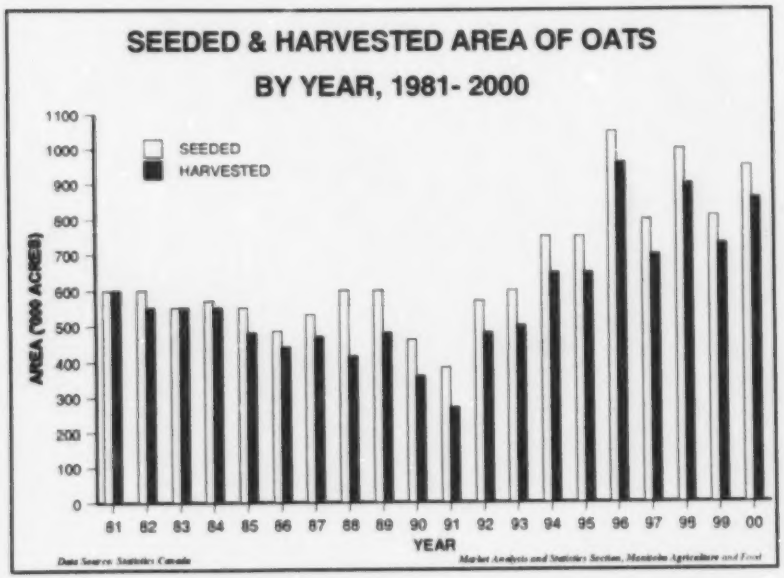
OATS AND OAT PRODUCTS SECTOR

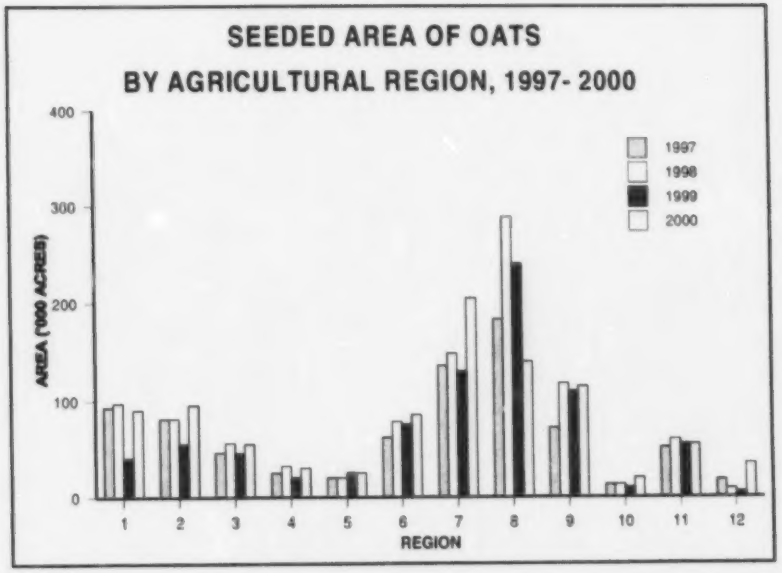
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	7,000	8,000	7,000	8,000	114
CROP PRODUCTION:					
Seeded Area ('000 acres):	800	1,000	810	950	117
% of Canada	17.3	19.6	17.4	21.1	
Harvested Area ('000 acres):	700	900	730	860	118
Yield/acre (bushels):	68.1	74.2	75.9	76.6	100
Production (million bu):	47.7	66.8	55.4	65.9	119
% of Canada	21.1	26.0	23.5	30.0	
Average Price ($/bu):	1.93	1.70	1.39	1.45	104
VALUE OF PRODUCTION ($ million):	92.0	113.3	76.9	95.5	124
ESTIMATED TOTAL EXPENSES ($/acre):	140.51	141.87	150.85	146.75	97
CASH RECEIPTS ($ million):	79.7	64.2	63.5	67.6	106
% of Canada	29.4	32.0	36.8	33.8	
ESTIMATED DISTRIBUTION OF OAT PRODUCTION BY TYPE (%):					
TAN (high protein milling oats)	70	65	68	63	93
WHITE (pony or performance oats)	20	21	22	31	141
OTHER (general purpose)	10	15	10	6	60
CROP DISPOSITION (million bu):	53.5	71.3	65.1	72.4	111
Marketings	31.3	39.7	46.7	51.4	110
Seed Requirements	2.3	1.9	2.2	2.1	95
Feed, Waste & Dockage	15.4	20.0	9.8	11.0	112
Carryover, July 31	4.5	9.7	6.5	7.8	120
EXPORTS ($ million):	116.0	93.5	101.8	110.1	108
Unprocessed	89.5	64.1	66.0	82.1	124
Processed	26.5	29.4	35.8	27.9	78
IMPORTS ($ thousand):	103.0	73.4	36.9	72.3	196
Unprocessed	21.0	65.4	3.5	23.3	666
Processed	82.0	8.0	33.4	49.0	147

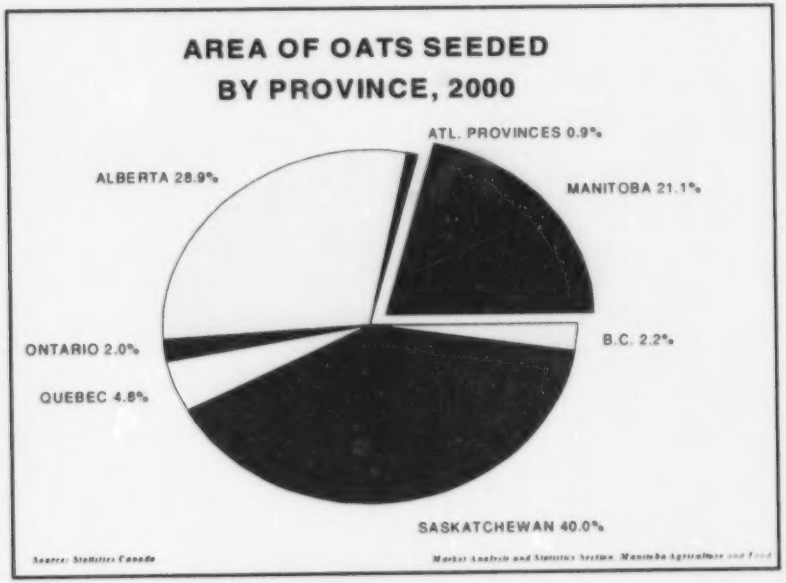
OAT INDUSTRY CHART, 2000

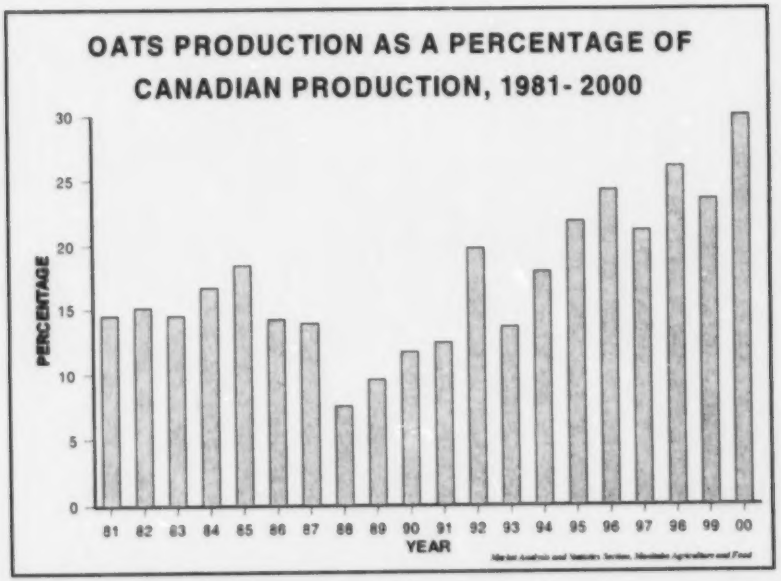


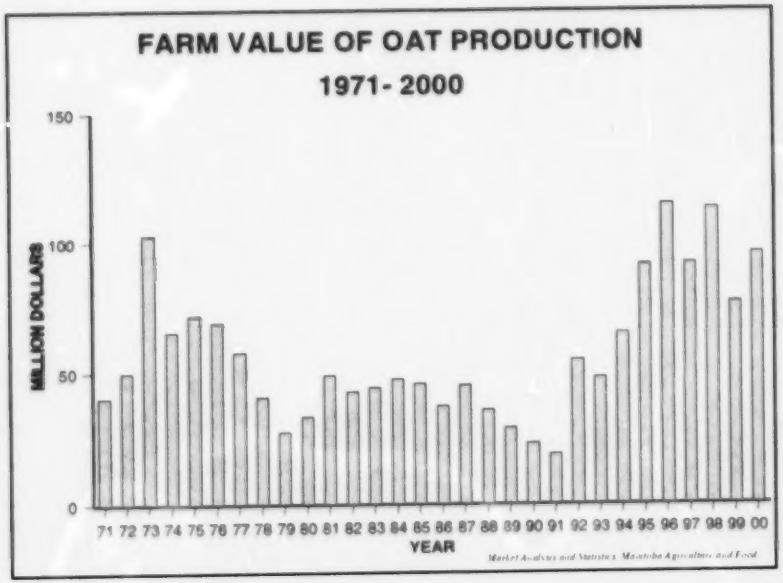
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

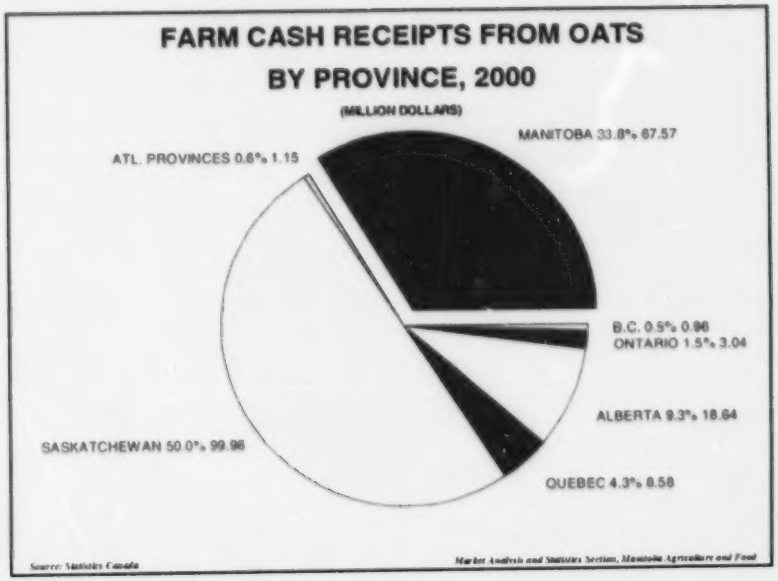

SEEDED & HARVESTED AREA OF OATS
BY YEAR, 1981- 2000
SEEDED
HARVESTED
AREA ('000 ACRES)
1100
1000
900
800
700
600
500
400
300
200
100
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

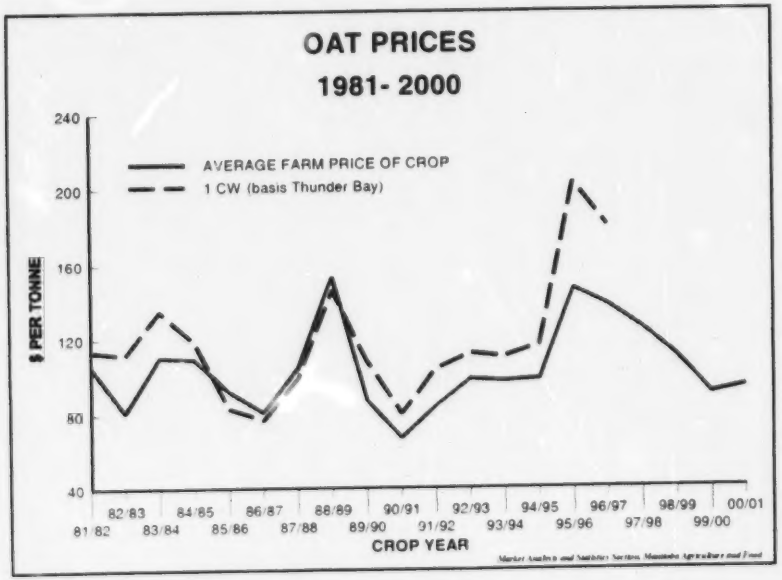

SEEDED AREA OF OATS
BY AGRICULTURAL REGION, 1997- 2000
1997
1998
1999
2000
AREA ('000 ACRES)
400
300
200
100
0
1 2 3 4 5 6 7 8 9 10 11 12
REGION

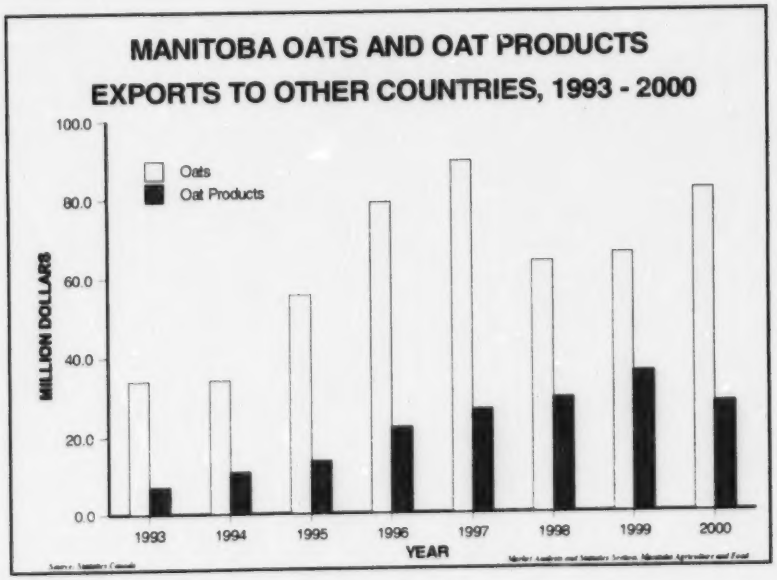

AREA OF OATS SEEDED
BY PROVINCE, 2000
ATL. PROVINCES 0.9%
MANITOBA 21.1%
B.C. 2.2%
SASKATCHEWAN 40.0%
QUEBEC 4.8%
ONTARIO 2.0%
ALBERTA 28.9%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

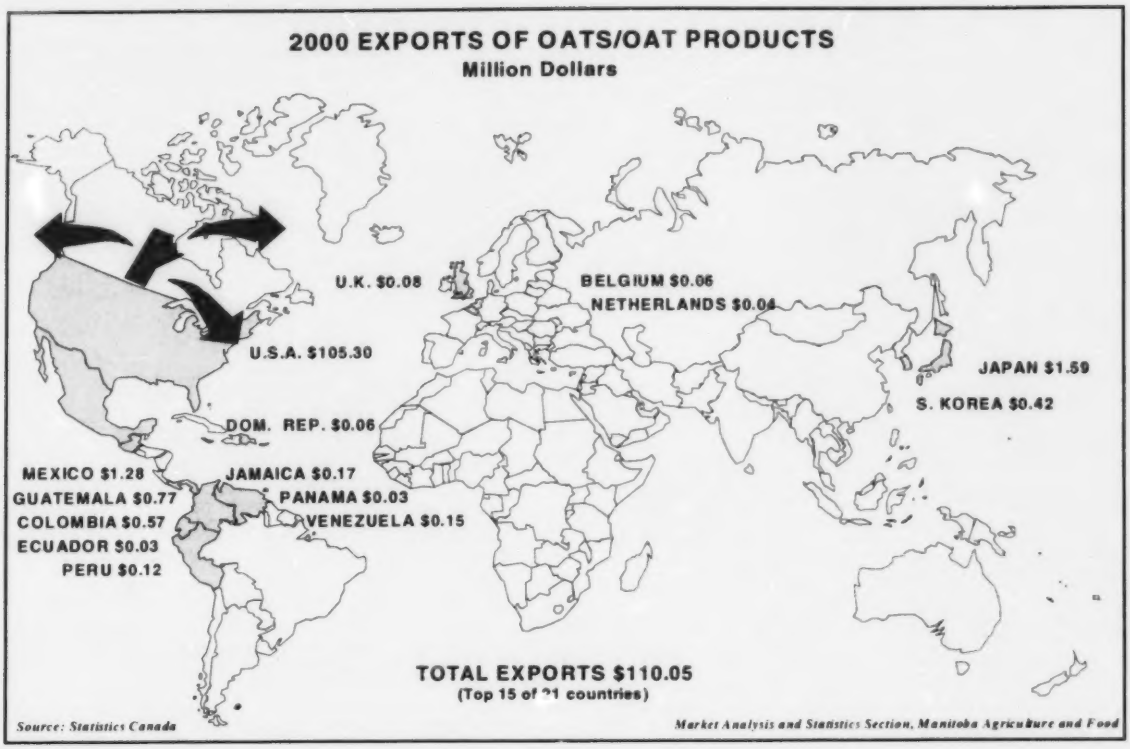

OATS PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981- 2000
PERCENTAGE
30
25
20
15
10
5
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

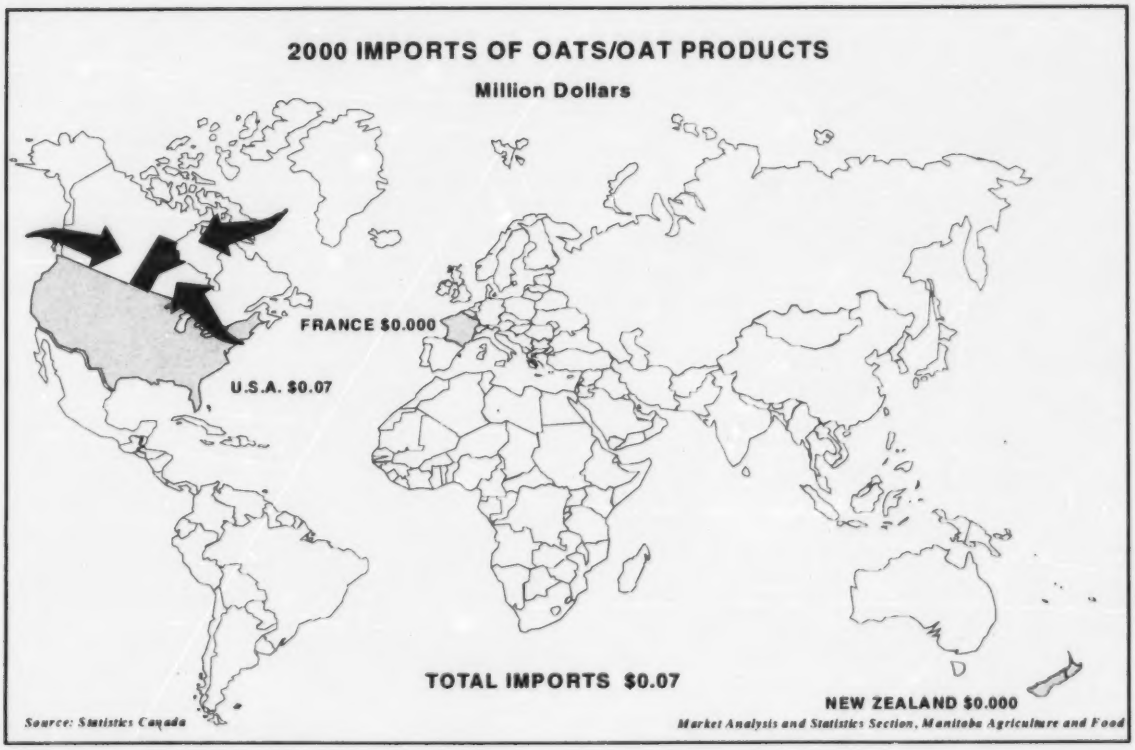

FARM VALUE OF OAT PRODUCTION
1971- 2000
MILLION DOLLARS
150
100
50
0
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


FARM CASH RECEIPTS FROM OATS
BY PROVINCE, 2000
(MILLION DOLLARS)
MANITOBA 33.8% 67.57
ATL. PROVINCES 0.6% 1.15
B.C. 0.5% 0.96
ONTARIO 1.5% 3.04
ALBERTA 9.3% 18.64
SASKATCHEWAN 50.0% 99.96
QUEBEC 4.3% 8.58


OAT PRICES
1981- 2000
AVERAGE FARM PRICE OF CROP
1 CW (basis Thunder Bay)
$ PER TONNE
240
200
160
120
80
40
82/83 84/85 86/87 88/89 90/91 92/93 94/95 96/97 98/99 00/01
81/82 83/84 85/86 87/88 89/90 91/92 93/94 95/96 97/98 99/00
CROP YEAR


MANITOBA OATS AND OAT PRODUCTS
EXPORTS TO OTHER COUNTRIES, 1993 - 2000
Oats
Oat Products
MILLION DOLLARS
100.0
80.0
60.0
40.0
20.0
0.0
1993 1994 1995 1996 1997 1998 1999 2000
YEAR


2000 EXPORTS OF OATS/OAT PRODUCTS
Million Dollars
U.K. $0.08
BELGIUM $0.06
NETHERLANDS $0.04
U.S.A. $105.30
JAPAN $1.59
S. KOREA $0.42
DOM. REP. $0.06
MEXICO $1.28
JAMAICA $0.17
GUATEMALA $0.77
PANAMA $0.03
COLOMBIA $0.57
VENEZUELA $0.15
ECUADOR $0.03
PERU $0.12
TOTAL EXPORTS $110.05
(Top 15 of 21 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF OATS/OAT PRODUCTS
Million Dollars
FRANCE $0.000
U.S.A. $0.07
TOTAL IMPORTS $0.07
NEW ZEALAND $0.000
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

RYE SECTOR

RYE SECTOR PROFILE

Production:

Manitoba producers have been growing rye since the early 1900s. The area of rye seeded and harvested has varied over the years, reaching a record 230,000 acres in 1982 and 1989. Low prices relative to alternative crops in 1990 led to declining areas planted to rye in the early 1990s and, by 1994, only 40,000 acres were seeded. Prices improved and the area increased to120,000 acres in 1998, but declined to 80,000 acres in 1999, partly due to excess soil moisture in the south-west, which hampered seeding. Low prices prompted a further reduction in seeded area to 55,000 acres in 2000. From a peak production of 8.4 million bushels in 1982, rye production declined to 1.5 million bushels in 1994. The 2000 production of 2.2 million bushels was down by 27 percent from the previous year. Manitoba produced 21.5 percent of the Canadian rye crop in 2000.

The average yield in 2000 was a record 40.0 bushels per acre, well above the10-year average of 34.0 bushels per acre. The previous record yield was 37.5 bushels per acre in 1994 and 1999. Average rye prices ranged from $2 per bushel for the 1992 crop to $4.34 per bushel for the 1980 crop. The price declined from $3.90 per bushel in 1997 to $1.71 per bushel in 1999, partly due to less of the crop being used for milling and more for feed. Prices rose to an average of $1.76 per bushel in 2000.

The total value of the Manitoba rye crop was highest in 1981, at $25.9 million, but dropped to an eight-year low of $3.7 million in 1993. The smaller crop was partly offset by higher prices resulting in a 24 percent reduction in the value of rye production from $5.1 million in 1999 to $3.9 million in 2000.

Estimated farm expenses for rye production, including operating, labour and fixed costs, rose from $129.03 per acre in 1992 to $148.80 in 1999, but fell to $144.37 in 2000.

Marketing:

Annual cash receipts from the sector increased from $2.9 million in 1993 to $10.1 million in 1996, but declined to $4.3 million in 2000. Manitoba's contribution to Canadian rye receipts rose from 14.0 percent in 1993 to 31.8 percent in 2000.

Rye is used for baking and flavouring as well as for livestock feed. Previous years' harvest surveys conducted by the Canadian Grain Commission show fairly high protein levels for the rye crop.

Rye marketings increased from 1.24 million bushels in 1993/94 to 3.05 million bushels in 1998/99, but declined to 1.94 million bushels in 2000/01. Rye carryover fell from 1.18 million bushels on July 31, 1999 to 0.39 million bushels two yeas later.

Processing:

Most Manitoba bakeries produce rye bread. Small quantities of rye malt are used to flavour the rye whiskey produced in Manitoba.

Trade:

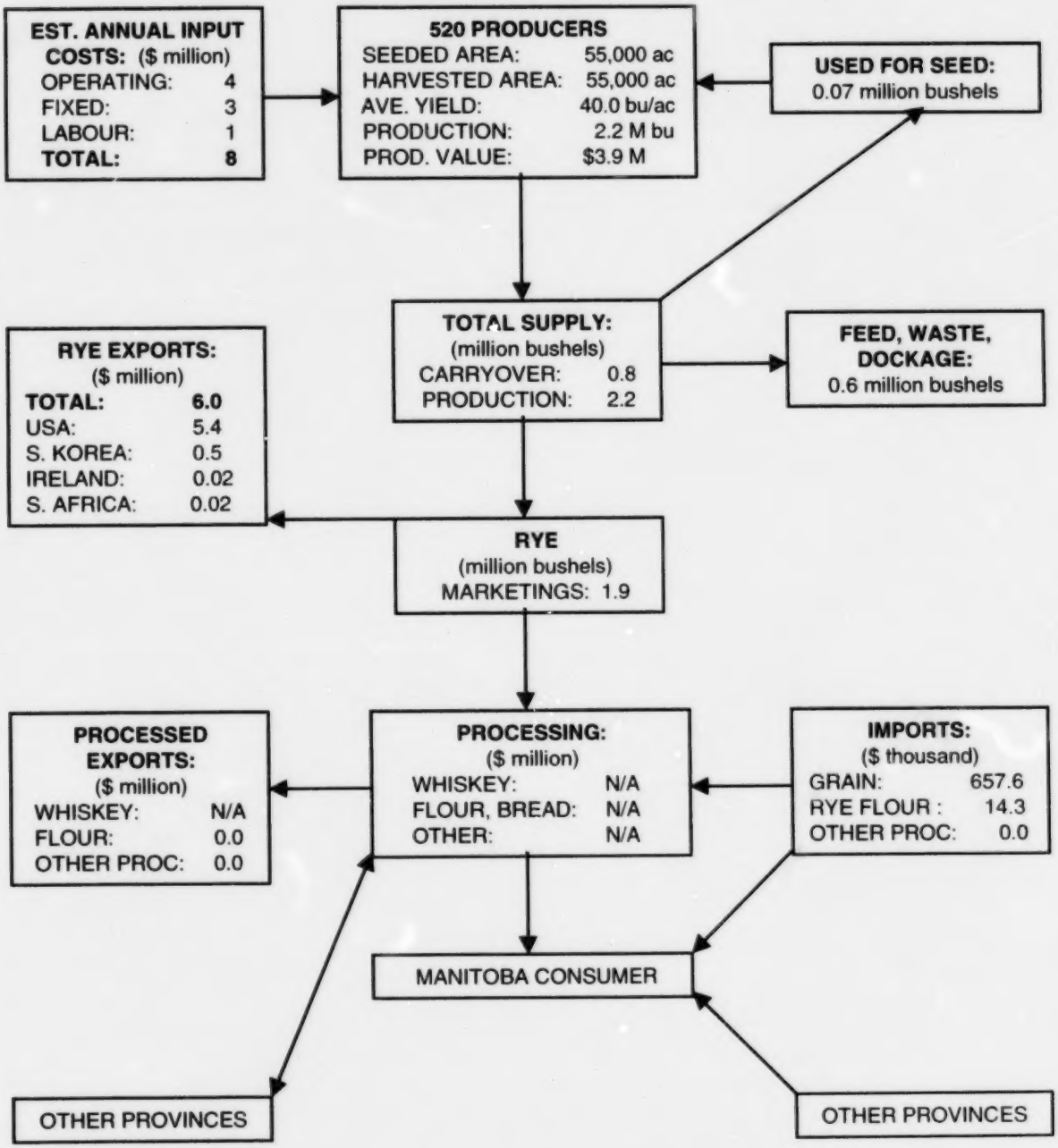
Unprocessed rye exports to other countries increased in value from $4.3 million in 1999 to $6.0 million in 2000. The United States was the primary market for Manitoba product in 2000 with small amounts going to South Korea, Ireland, South Africa and three other countries. Minimal amounts of rye flour, valued at $12,500, were exported to Belgium in 1996, but none was exported in the next four years.

Imports of unprocessed rye from the United States increased in value from $218,900 in 1999 to $657,600 in 2000. At the same time, however, imports of rye flour fell from $19,500 to $14,300.

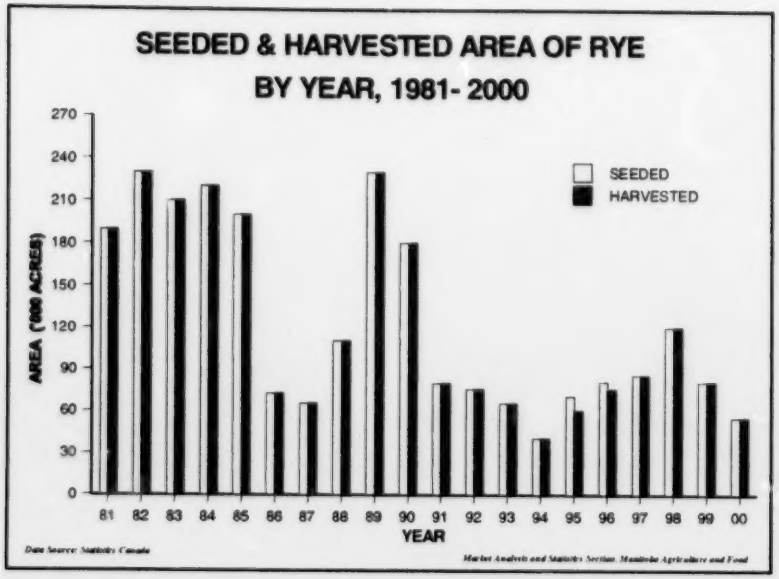
RYE AND RYE PRODUCTS SECTOR

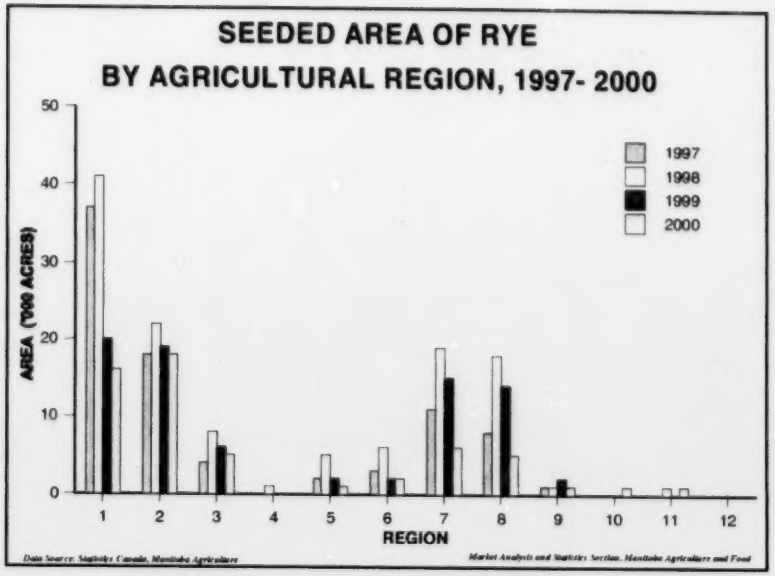
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	760	900	760	520	68
CROP PRODUCTION:					
Seeded Area ('000 acres):	85	120	80	55	69
% of Canada	21.1	21.3	17.3	14.9	
Harvested Area ('000 acres):	85	120	80	55	69
Yield/acre (bushels):	28.8	35.0	37.5	40.0	107
Production (million bushels):	2.5	4.2	3.0	2.2	73
% of Canada	19.5	26.8	19.7	21.5	
Average Price ($/bu):	3.90	2.33	1.71	1.76	103
VALUE OF PRODUCTION ($ million):	9.6	9.8	5.1	3.9	76
ESTIMATED TOTAL EXPENSES ($/acre):	147.73	148.18	148.80	144.37	97
CASH RECEIPTS ($ million):	9.0	5.1	5.1	4.3	83
% of Canada	26.5	25.6	29.9	31.8	
ESTIMATED QUALITY OF RYE CROP (% protein content):					
All Grades	11.0	N/A	N/A	N/A	
1CW	11.0	N/A	N/A	N/A	
2CW	11.2	N/A	N/A	N/A	
3CW	10.8	N/A	N/A	N/A	
CROP DISPOSITION (thousand bu.):	2,449	4,240	4,181	2,987	71
Marketings	2,070	3,050	2,830	1,940	69
Seed Requirements	146	102	71	71	100
Feed, Waste & Dockage	194	-94	493	583	118
Carryover, July 31	39	1,181	787	394	50
EXPORTS ($ thousand):	11,369.5	5,378.4	4,268.2	6,015.7	141
Unprocessed	11,369.5	5,378.4	4,268.2	6,015.7	141
Processed	0	0	0	0	0
IMPORTS ($ thousand):	30.9	54.3	238.4	671.9	282
Unprocessed	0.0	15.0	218.9	657.6	300
Processed	30.9	39.2	19.5	14.3	73

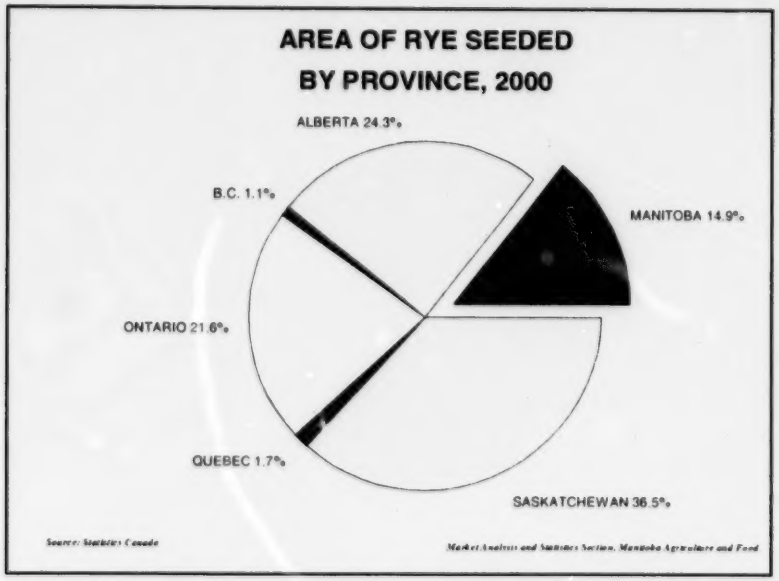
RYE INDUSTRY CHART, 2000

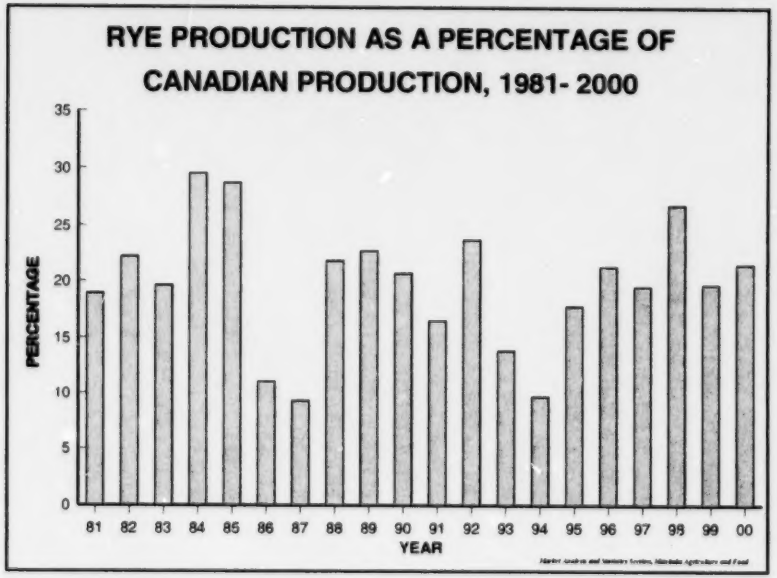


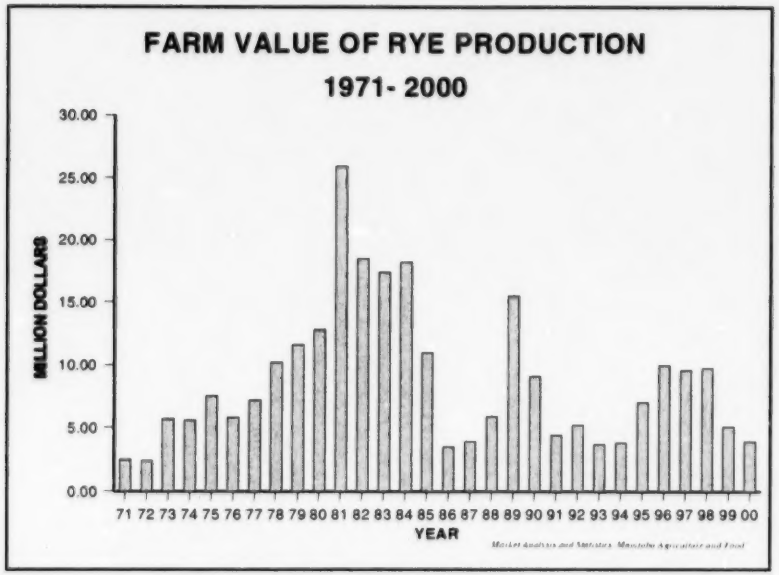
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

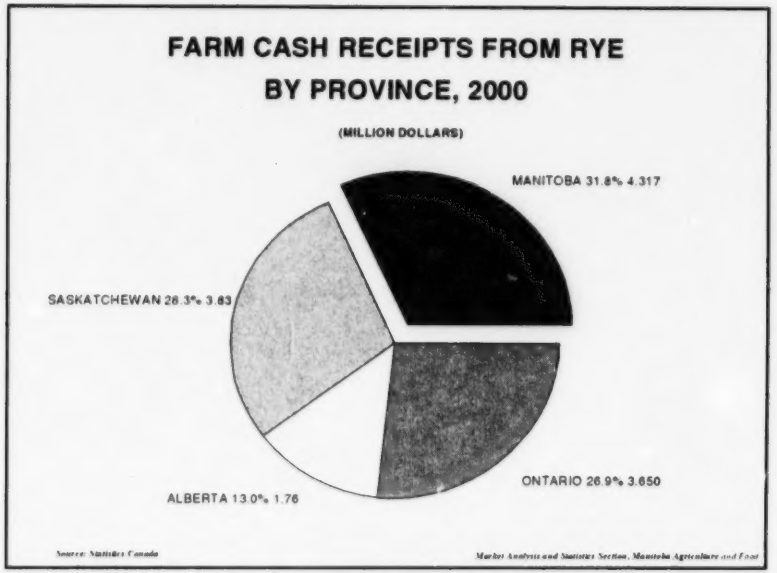

SEEDED & HARVESTED AREA OF RYE
BY YEAR, 1981- 2000
AREA ('000 ACRES)
270
240
210
180
150
120
90
60
30
0
SEEDED
HARVESTED
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

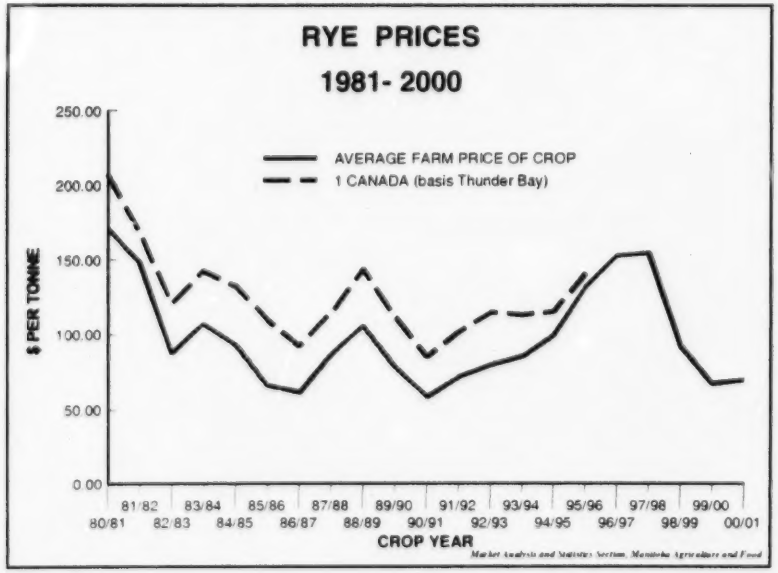

SEEDED AREA OF RYE
BY AGRICULTURAL REGION, 1997- 2000
AREA ('000 ACRES)
50
40
30
20
10
0
1997
1998
1999
2000
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food

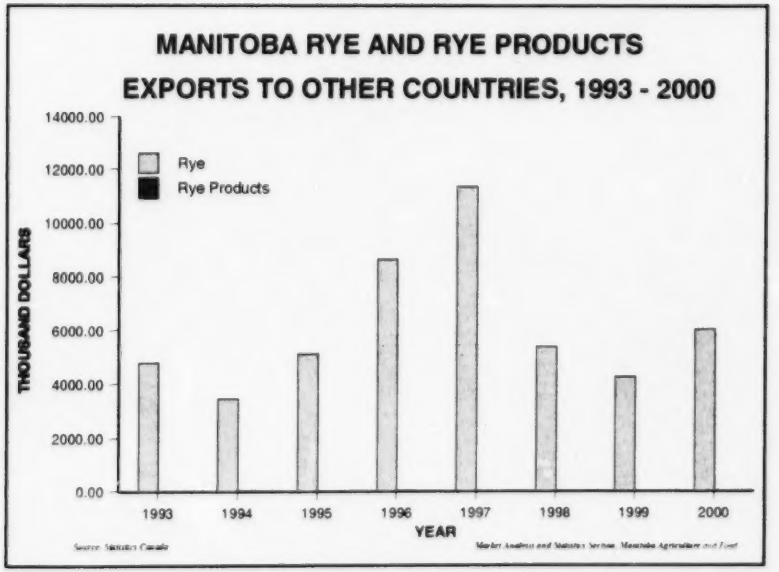

AREA OF RYE SEEDED
BY PROVINCE, 2000
ALBERTA 24.3%
B.C. 1.1%
MANITOBA 14.9%
ONTARIO 21.6%
QUEBEC 1.7%
SASKATCHEWAN 36.5%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

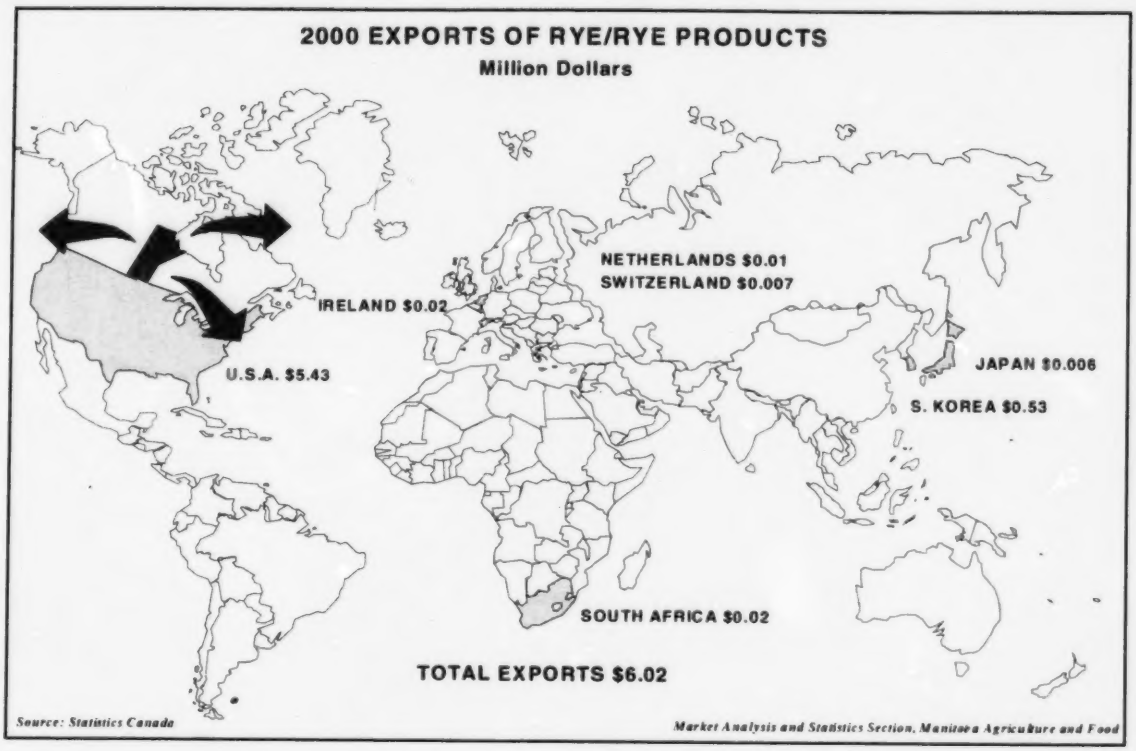

RYE PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981- 2000
PERCENTAGE
35
30
25
20
15
10
5
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR

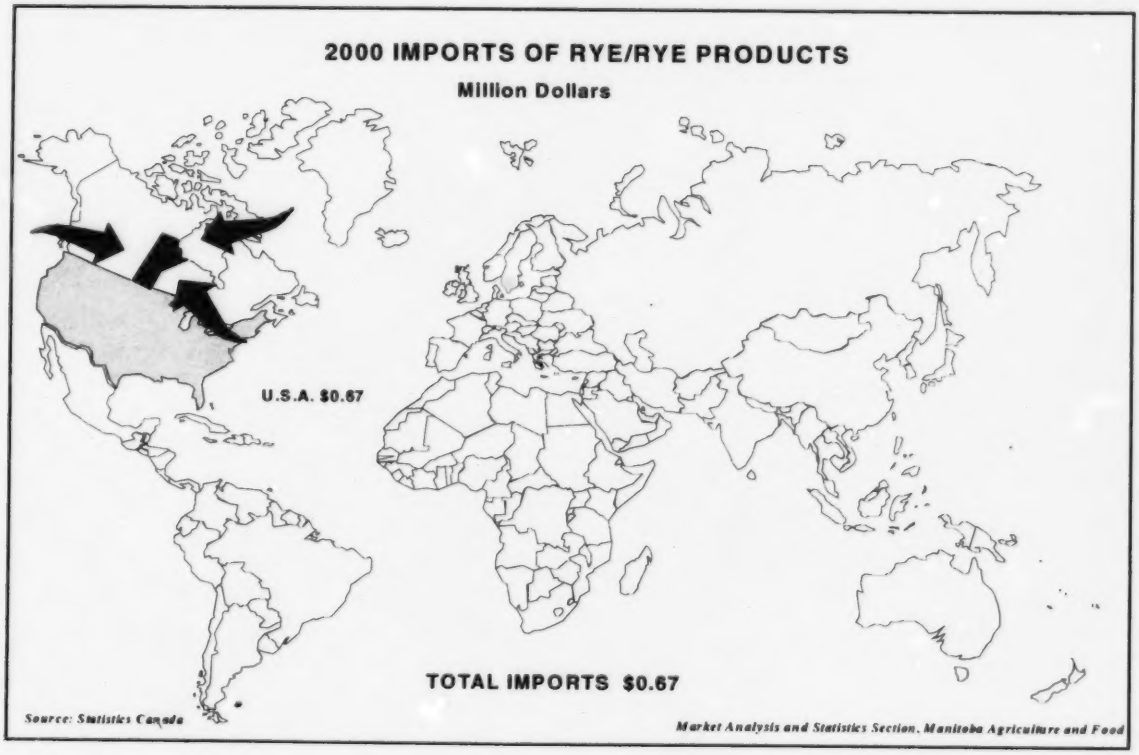

FARM VALUE OF RYE PRODUCTION
1971- 2000
MILLION DOLLARS
30.00
25.00
20.00
15.00
10.00
5.00
0.00
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


FARM CASH RECEIPTS FROM RYE
BY PROVINCE, 2000
(MILLION DOLLARS)
MANITOBA 31.8% 4.317
SASKATCHEWAN 28.3% 3.83
ONTARIO 26.9% 3.650
ALBERTA 13.0% 1.76

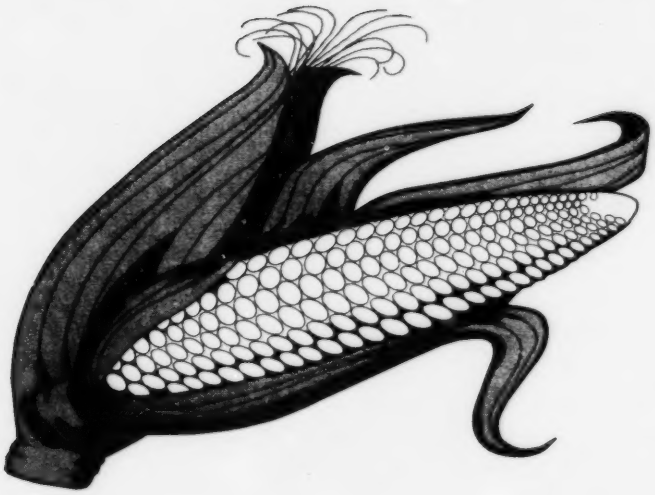

RYE PRICES
1981- 2000
AVERAGE FARM PRICE OF CROP
1 CANADA (basis Thunder Bay)
$ PER TONNE
250.00
200.00
150.00
100.00
50.00
0.00
81/82 83/84 85/86 87/88 89/90 91/92 93/94 95/96 97/98 99/00
80/81 82/83 84/85 86/87 88/89 90/91 92/93 94/95 96/97 98/99 00/01
CROP YEAR


MANITOBA RYE AND RYE PRODUCTS
EXPORTS TO OTHER COUNTRIES, 1993 - 2000
THOUSAND DOLLARS
14000.00
12000.00
10000.00
8000.00
6000.00
4000.00
2000.00
0.00
Rye
Rye Products
1993 1994 1995 1996 1997 1998 1999 2000
YEAR


2000 EXPORTS OF RYE/RYE PRODUCTS
Million Dollars
NETHERLANDS $0.01
SWITZERLAND $0.007
IRELAND $0.02
U.S.A. $5.43
JAPAN $0.006
S. KOREA $0.53
SOUTH AFRICA $0.02
TOTAL EXPORTS $6.02
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF RYE/RYE PRODUCTS
Million Dollars
U.S.A. $0.67
TOTAL IMPORTS $0.67
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

GRAIN CORN SECTOR



GRAIN CORN SECTOR PROFILE

Production:

Manitoba producers grew very little corn for grain prior to 1978, when 88,000 acres were harvested. Harvested areas were greatest in the early 1980s, reaching a record 225,000 acres in 1981. Lower prices and adverse weather conditions led to smaller areas of grain corn being harvested between 1992 and 1995. The area seeded to grain corn increased from 45,000 acres in 1995 to 145,000 acres in 2000. In addition, 30,000 acres of corn was grown for silage purposes in 2000. From a peak production of 17.0 million bushels in 1981, the grain corn crop declined to 1.4 million bushels in 1992, but increased to 10.4 million bushels in 2000. This was up by 10.6 percent from the previous year. Manitoba produced almost all of the 2000 Western Canadian grain corn crop, but only 3.9 percent of total Canadian corn production.

Yields averaged 80.0 bushels per acre in 2000, well below the record 94.4 bushels per acre in 1998, but above the 10-year average of 76.3 bushels per acre.

Average grain corn prices rose from $2.35 per bushel for the 1992 crop to a record $4.50 for the 1995 crop. The price decreased each year after that to average $2.57 per bushel in 1999, but was slightly higher at $2.79 per bushel in 2000. The total value of the Manitoba corn crop was highest in 1981, at $45.8 million, but in 1992, the value dropped to the lowest level, $3.3 million, for the period, 1976-2000. The larger crop and higher prices raised the value of grain corn production by 20.5 percent from $24.1 million in 1999 to $29.06 million in 2000.

Estimated farm expenses for grain corn production, including operating, labour and fixed costs, rose from $234.05 per acre in 1992 to $269.10 per acre in 1996, but declined to $255.32 per acre in 1997. Expenses were $263.63 per acre in 2000.

Marketing:

Annual cash receipts from the sector increased over the past six years, rising from $1.7 million in 1993 to $22.1 million in 2000. Manitoba's contribution to Canadian grain corn receipts rose from a low of 0.4 percent in 1993 to 3.2 percent in 2000.

All the corn produced in 2000 was sold to feed mills, grain handling firms or fed on farms. Any crop carryover at August 1 is used for pre-harvest feeding or distilling requirements.

Processing:

The distillery at Gimli uses about 1.8-2.0 million bushels of corn annually, the equivalent of 20-35 percent of Manitoba's crop. Manitoba farmers have provided much of the distillery requirements for high quality corn, except in the years 1985, 1986, 1992 and 1993, when Manitoba grain corn production and quality were low and virtually all the corn requirements of the distillery had to be met by U.S. suppliers. Corn is also processed and used for hog and poultry feed. Fodder corn silage, including stalks and stems, is fed to dairy and beef cattle.

Trade:

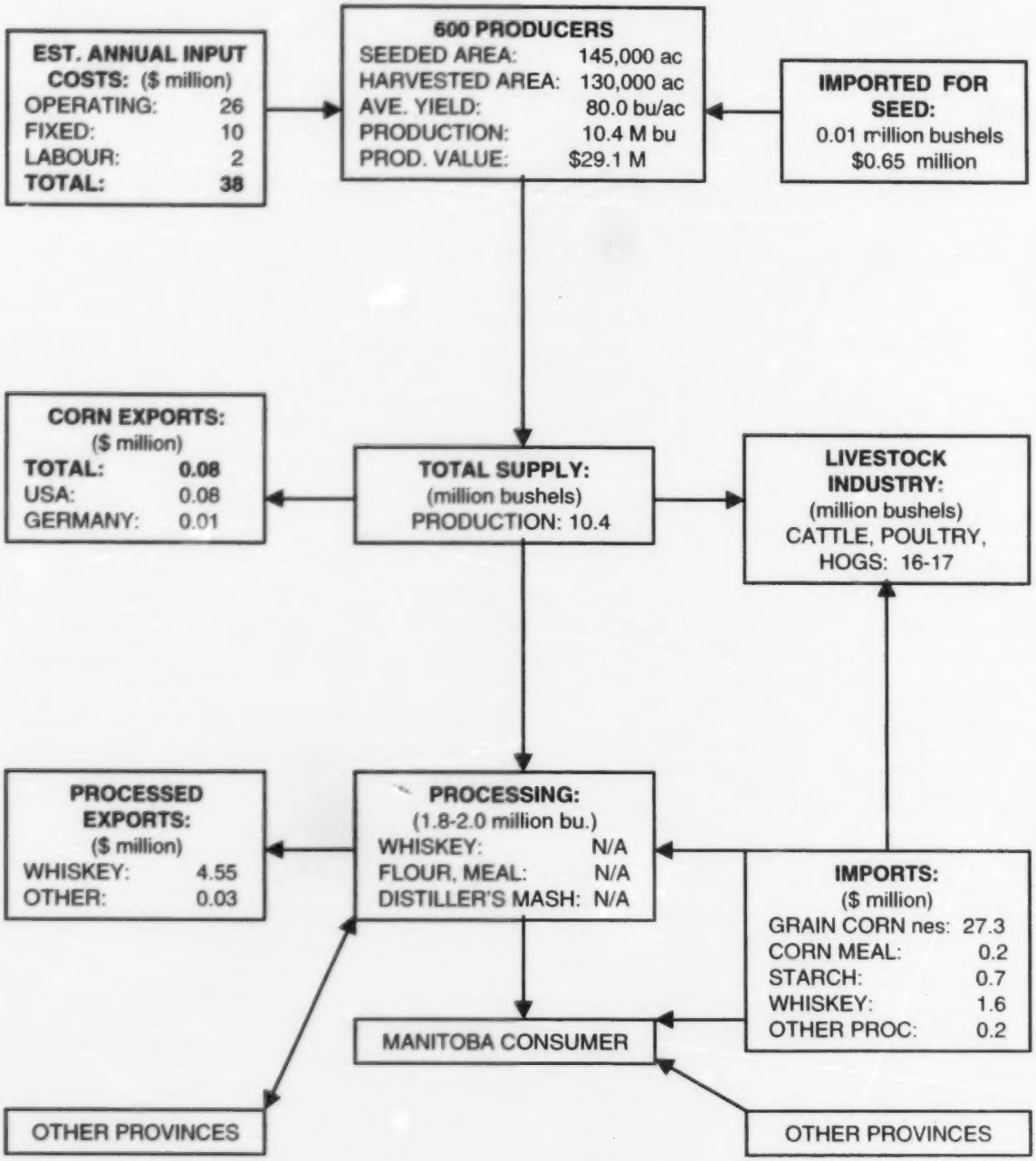
Exports of corn to other countries increased in value from $0.07 million in 1998 to $13.3 million in 1999, but fell to $0.08 million in 2000. The United States is usually the primary market for Manitoba corn exports. However, in 1999, the majority of corn exports, valued at $13.1 million, were destined for Iran. Whiskey exports were valued at $1.0 million in 1996, there were no exports in 1997, but whiskey exports have been increasing over the past three years to $4.55 million in 2000.

Imports of corn from the U.S., mainly for processing into hog and poultry feed, fell from $35.2 million in 1999 to $28.0 million in 2000, including corn imported for seed valued at $0.7 million. A temporary countervailing duty on corn imported into Canada was responsible for the decrease. Corn flour, meal and starch imports amounted to $1.1 million and whiskey imports totalled $1.6 million in 2000.

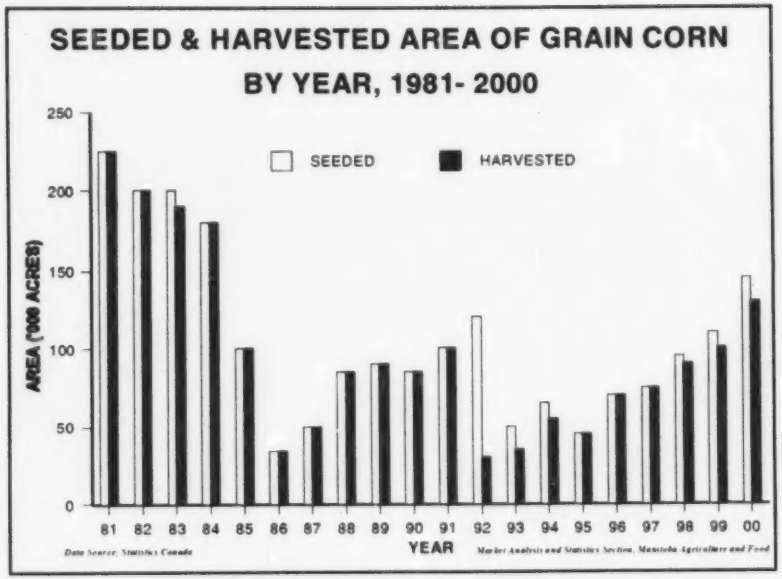
GRAIN CORN AND GRAIN CORN PRODUCTS SECTOR

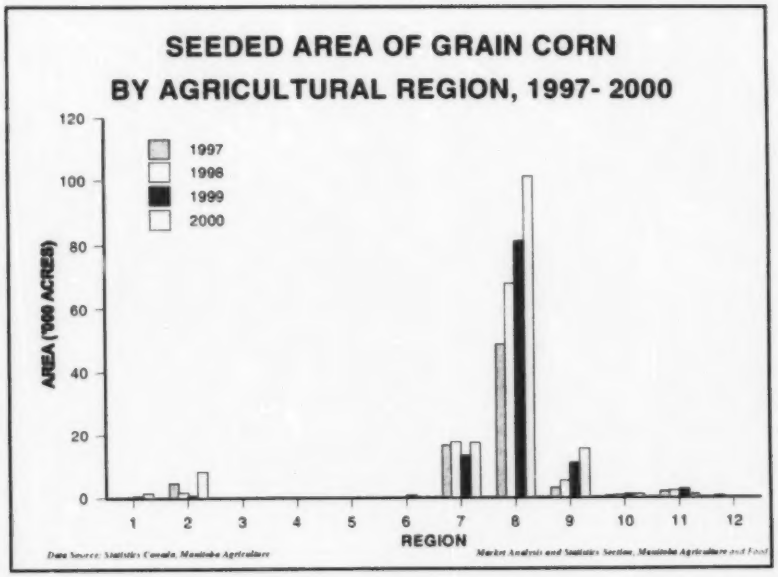
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	360	450	520	600	115
CROP PRODUCTION:					
Seeded Area ('000 acres):	75.0	95.0	110.0	145.0	132
% of Canada	2.9	3.4	3.8	5.0	
Harvested Area ('000 acres):	75.0	90.0	100.0	130.0	130
Yield/acre (bushels):	80.0	94.4	94.0	80.0	85
Production (million bushels):	6.0	8.5	9.4	10.4	111
% of Canada	2.1	2.4	2.6	3.9	
Average Price ($/bu):	3.28	2.90	2.57	2.79	109
VALUE OF PRODUCTION ($ million):	19.7	24.6	24.1	29.1	121
ESTIMATED TOTAL EXPENSES ($/acre):	255.32	260.42	268.80	263.63	98
CASH RECEIPTS ($ million):	16.3	17.8	19.2	22.1	115
% of Canada	2.3	2.8	2.6	3.2	
EXPORTS ($ million):	1.26	2.11	17.54	4.66	27
Unprocessed	1.08	0.07	13.28	0.08	-
Processed:	0.18	2.03	4.26	4.58	108
Whiskey	0	2.03	4.25	4.55	107
Other	0.18	0.003	0.014	0.029	208
IMPORTS ($ million):	21.4	26.7	38.2	30.8	80
Unprocessed:	18.3	24.5	35.2	28.0	80
For seed	0.2	0.3	0.5	0.7	140
Other: ($ million)	18.1	24.2	34.7	27.3	79
(million bushels)	4.5	6.4	9.5	7.9	83
Processed:	3.0	2.2	3.0	2.7	90
Whiskey	1.8	1.7	2.4	1.6	67
Other	1.2	0.5	0.6	1.1	187

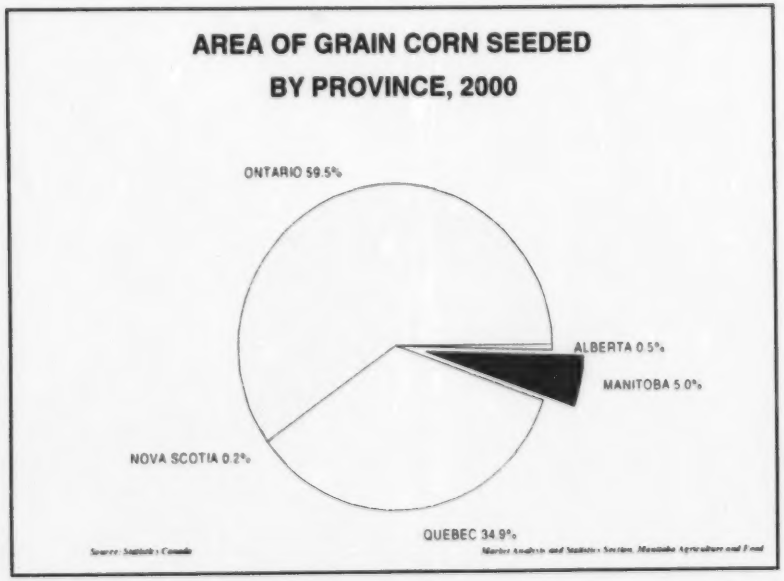
GRAIN CORN INDUSTRY CHART, 2000

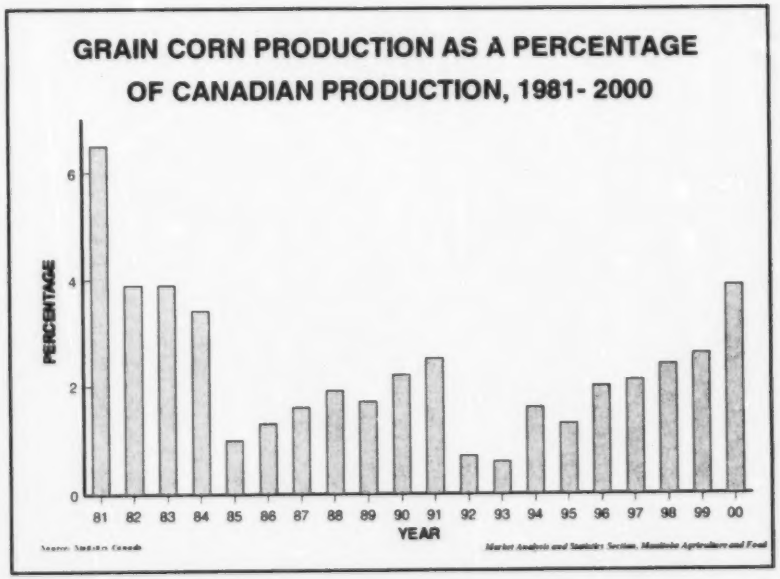


DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

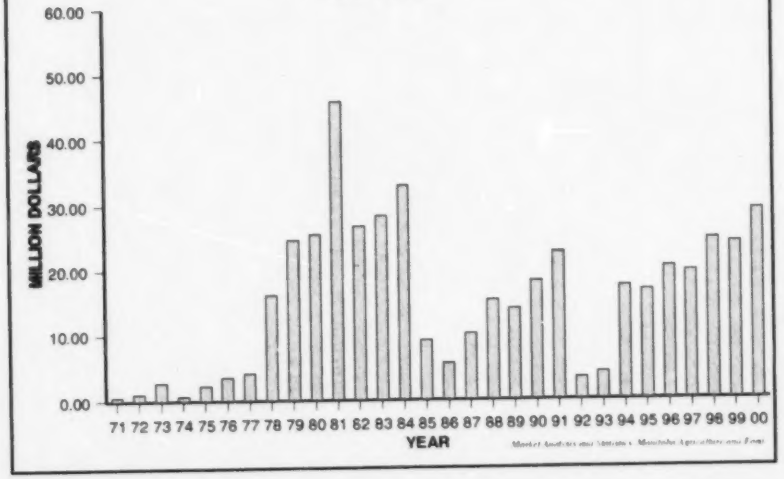

SEEDED & HARVESTED AREA OF GRAIN CORN
BY YEAR, 1981- 2000
SEEDED
HARVESTED
AREA ('000 ACRES)
250
200
150
100
50
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


SEEDED AREA OF GRAIN CORN
BY AGRICULTURAL REGION, 1997- 2000
1997
1998
1999
2000
AREA ('000 ACRES)
120
100
80
60
40
20
0
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food

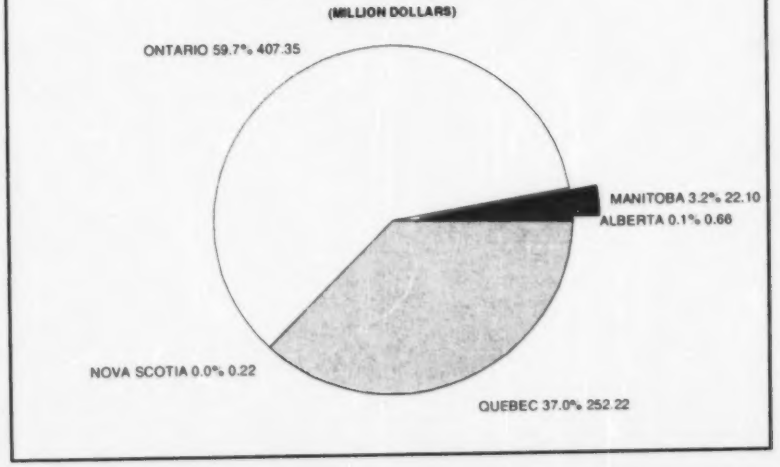

AREA OF GRAIN CORN SEEDED
BY PROVINCE, 2000
ONTARIO 59.5%
ALBERTA 0.5%
MANITOBA 5.0%
NOVA SCOTIA 0.2%
QUEBEC 34.9%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


GRAIN CORN PRODUCTION AS A PERCENTAGE
OF CANADIAN PRODUCTION, 1981- 2000
PERCENTAGE
6
4
2
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

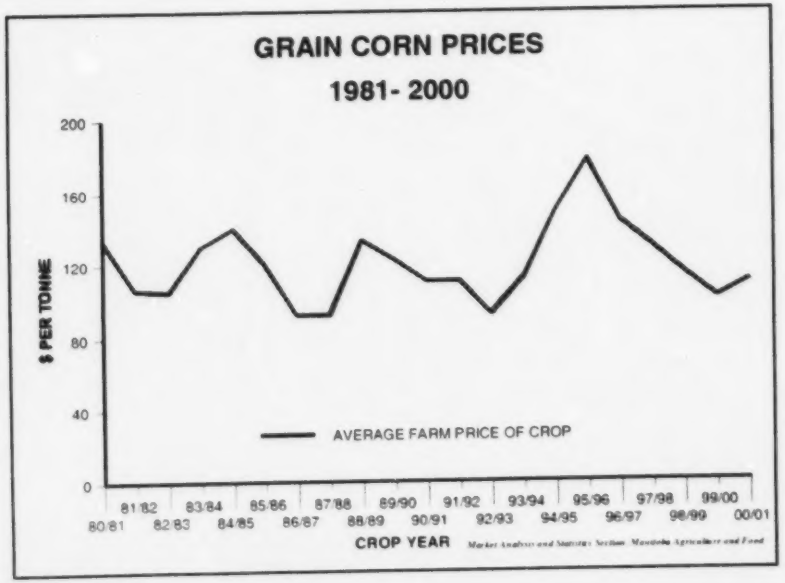
FARM VALUE OF GRAIN CORN PRODUCTION 1971-2000



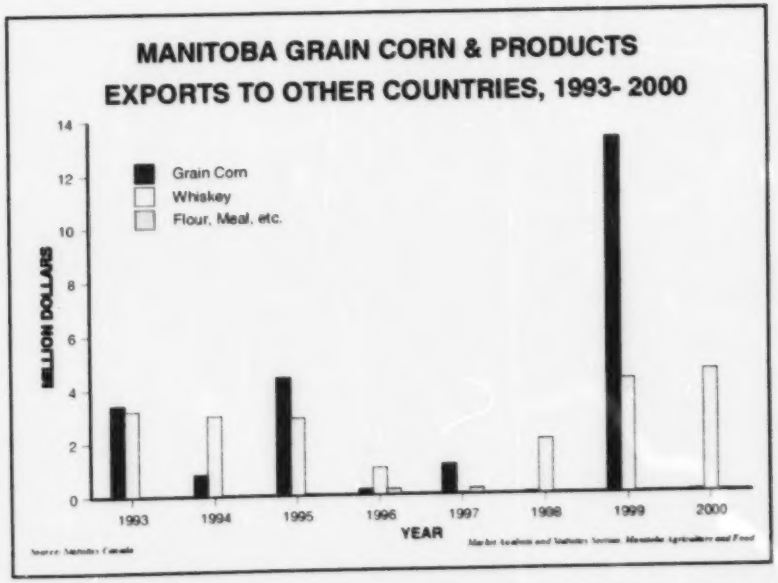
FARM CASH RECEIPTS FROM GRAIN CORN BY PROVINCE, 2000

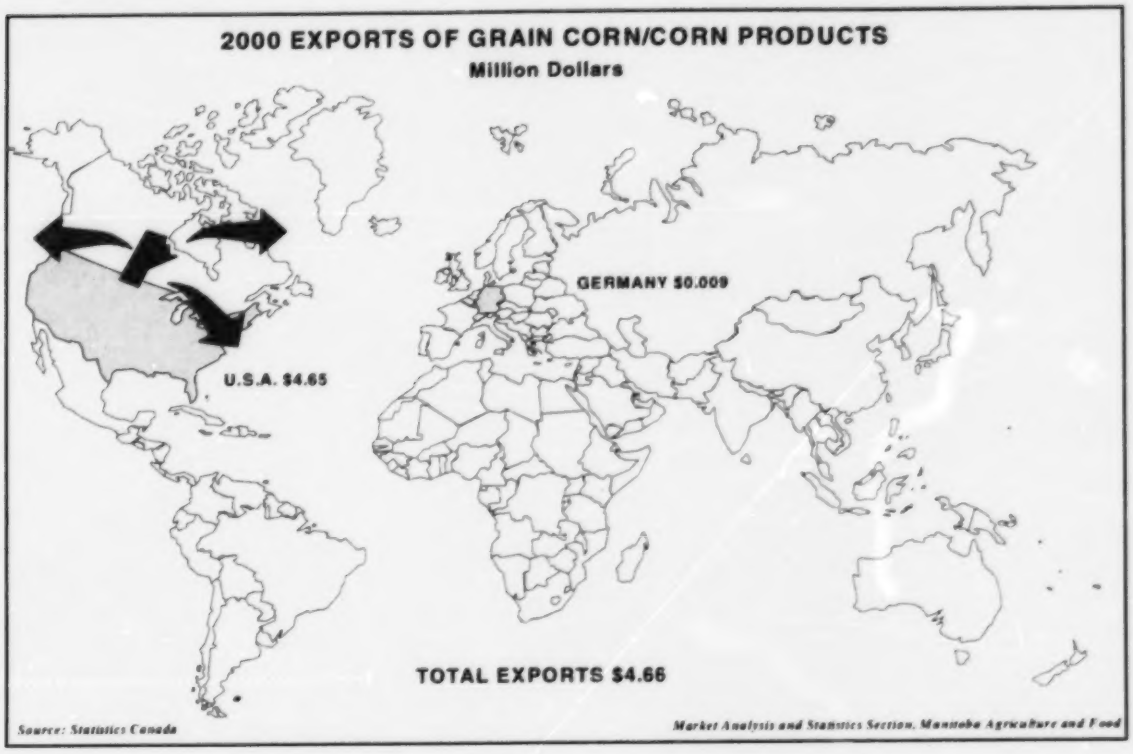


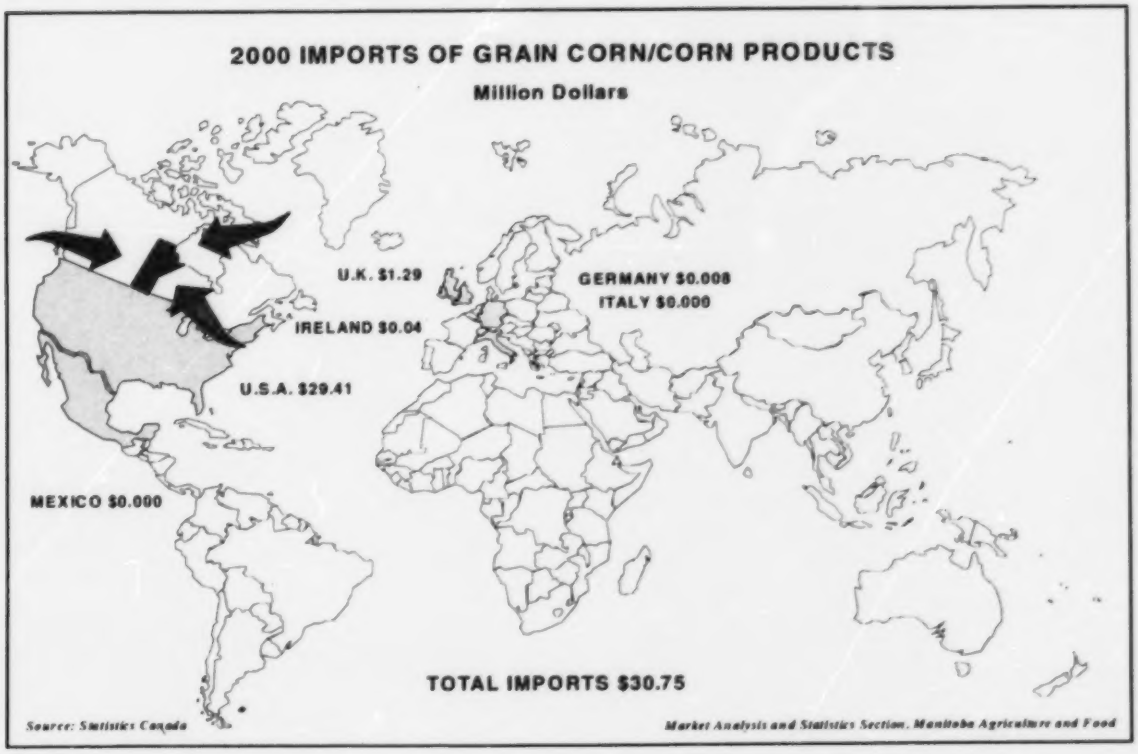
GRAIN CORN PRICES 1981- 2000



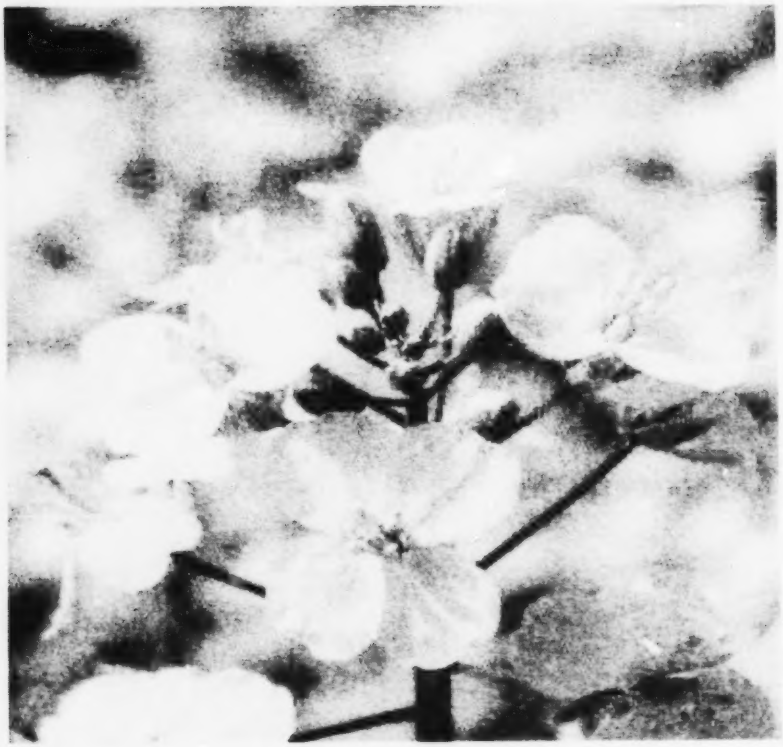
MANITOBA GRAIN CORN & PRODUCTS EXPORTS TO OTHER COUNTRIES, 1993- 2000




2000 EXPORTS OF GRAIN CORN/CORN PRODUCTS
Million Dollars
GERMANY $0.009
U.S.A. $4.65
TOTAL EXPORTS $4.66
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF GRAIN CORN/CORN PRODUCTS
Million Dollars
U.K. $1.29
GERMANY $0.008
ITALY $0.000
IRELAND $0.04
U.S.A. $29.41
MEXICO $0.000
TOTAL IMPORTS $30.75
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

CANOLA SECTOR



CANOLA SECTOR PROFILE

Production:

Rapeseed was introduced as an alternative crop for Manitoba producers during World War II. The crop increased in significance in the late 1960s-early 1970s when research and development of canola produced varieties with oil suitable for human consumption and meal for livestock feed.

The area seeded to canola (rapeseed) in Manitoba rose from 29,300 acres in 1961 to 581,000 acres ten years later. The canola area ranged between 250,000 acres and 1.9 million acres until 1994 when 2.55 million acres were seeded. Forecasts of high grain prices in 1995 as well as the necessity of crop rotation led to a decrease of 8 percent in canola acres seeded in 1995 and a further drop of 33 percent to 1.57 million acres in 1996. The area seeded to canola rebounded to 2.4 million acres in 1997 and peaked in 1998 at 2.75 million acres, of which 2.73 million acres were harvested. 1998 canola production of 79.5 million bushels was also a record. However, a significant decline in canola prices in 1999 and 2000 led to the decline in seeded and harvested areas to 2.35 and 2.31 million acres respectively in 2000. Manitoba produced 65.6 million bushels in 2000, which was 20.9 percent of the Canadian canola crop, up from 19.4 percent in 1999.

Yields, averaging 28.4 bushels per acre in 2000, were 7.2 percent below the record yield of 30.6 bushels per acre in 1999, but 3.3 percent above the 10-year average of 27.5 bushels per acre. The average price of canola rose steadily from $5.35 per bushel for the 1991 crop to a high of $8.73 for the 1996 crop, but declined to $5.22 per bushel and $5.44 per bushel for the 1999 and 2000 crops. The total value of the Manitoba canola crop peaked in 1998, at $631.1 million, but decreased to $357.1 million in 2000. Canola was the second most valuable crop in Manitoba after wheat.

Estimated farm expenses, including operating, labour and fixed costs, for canola production rose from $162.65 per acre in 1992 to $221.31 per acre in 1999 due mainly to increases in fertilizer and pesticide costs, but declined to $217.91 per acre in 2000.

Marketing:

Annual canola cash receipts rose from $197.1 million in calendar year 1992 to a record $622.3 million in 1998, but fell to $291.7 million in 2000. Manitoba's contribution to Canadian canola receipts was 18.5 percent in 2000, down from 23.4 percent in 1998.

About 87 percent of the 2000 canola samples tested by the Canadian Grain Commission graded 1Canada with an average of 42.0 percent oil and 22.0 percent protein and 9.4 percent graded 2Canada. Canola marketings increased to a record 69.7 million bushels in 1998/99, but declined to 65.6 million bushels in 2000/01. Canola carryover rose from 0.4 million bushels in 1997/98 to 11.0 million bushels at the end of the 1999/2000 crop year, but dropped to 4.8 million bushels in 2000/01.

Processing:

Canola is processed by two crushing plants owned by CanAmera, one at Altona and the other at Harrowby on the Saskatchewan border. Together the two plants have a crushing capacity of approximately 28 million bushels per year and both have refining capacity. Output from the plants includes bulk crude and refined oil, bulk vegetable oil, retail pack refined oil, hulls and screenings. Canola meal is a by-product used for livestock feed. A new cold-crush plant was built in Ste. Agathe in 1997, but only crushed minimal amounts of canola in 1998 and 1999 due to financial difficulties.

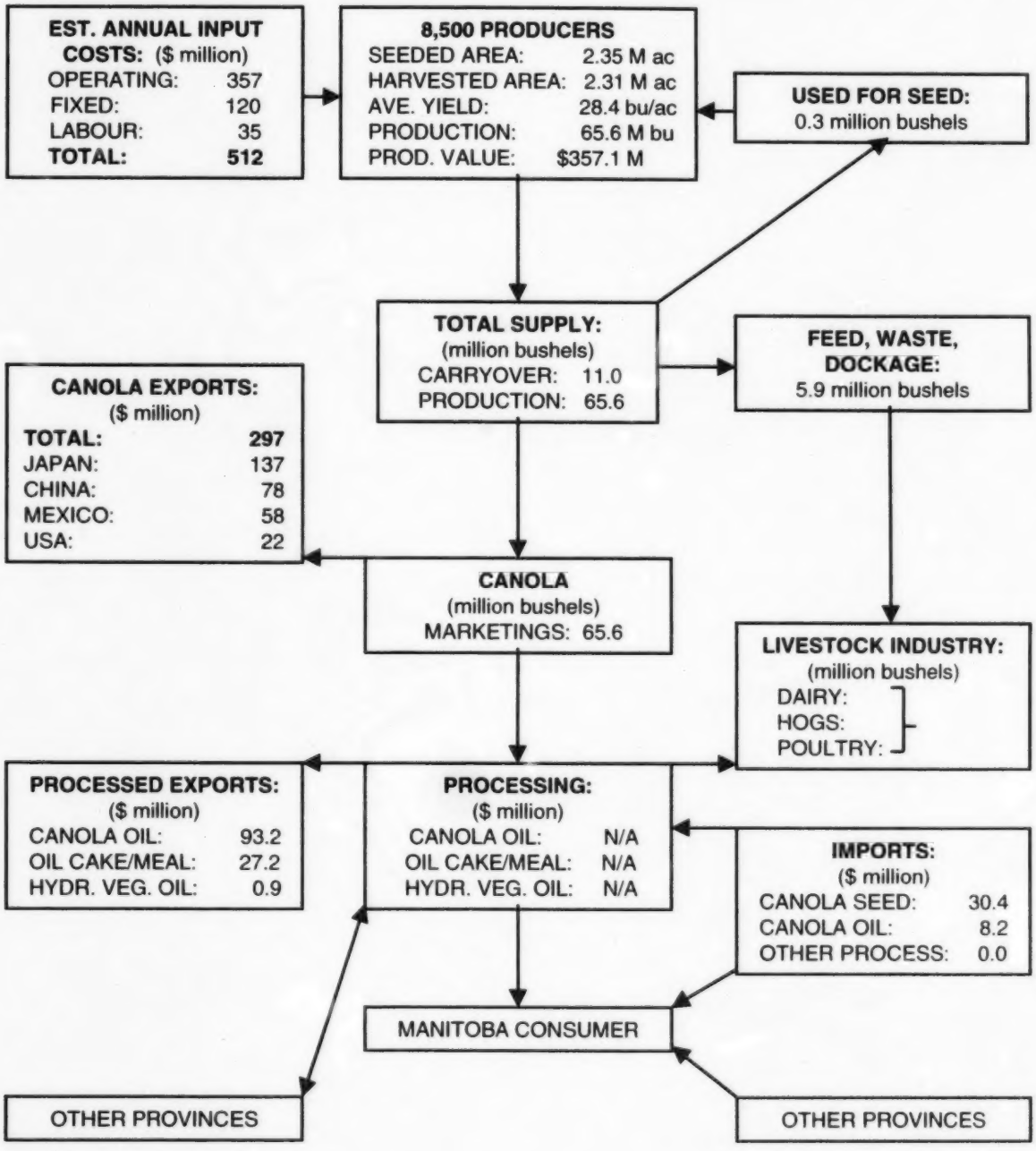
Trade:

Manitoba exported canola seed valued at $296.6 million in 2000 to 12 countries, such as Japan, China, Mexico and U.S.A. Canola oil exports fell from $239.1 million in 1999 to $93.2 million in 2000. Exports of hydrogenated oil and canola meal were valued at $0.9 million and $27.2 million, respectively. Manitoba processors accept deliveries of U.S. canola seed, and in 2000, seed imports amounted to $30.4 million. Manitoba also produces and exports high-erucic rapeseed under contract for industrial use in the U.S.

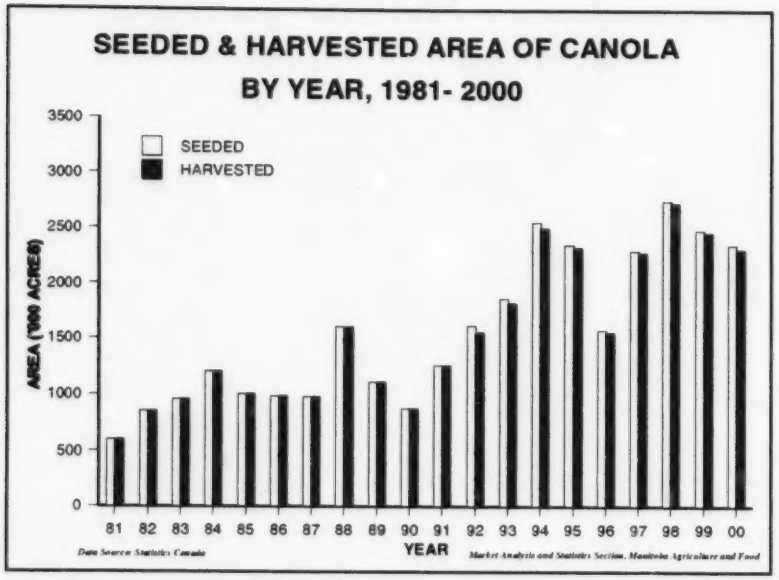
CANOLA AND CANOLA PRODUCTS SECTOR

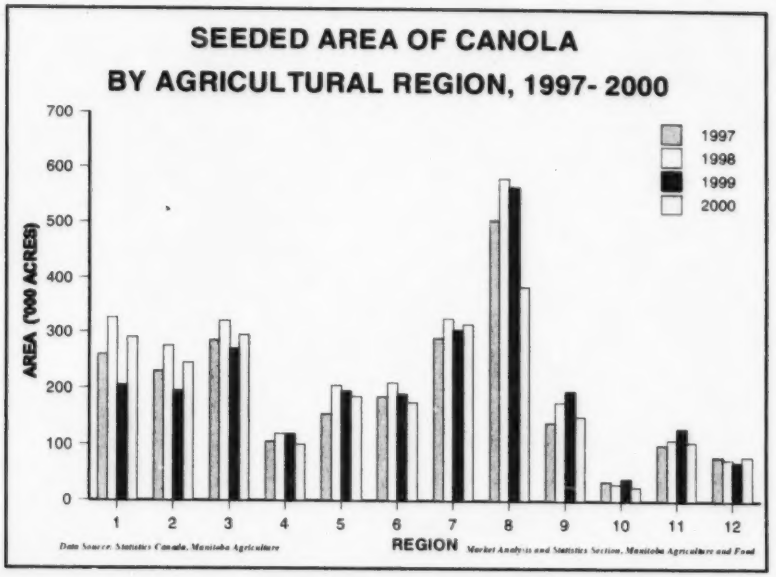
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	9,000	9,500	9,000	8,500	94
CROP PRODUCTION:					
Seeded Area ('000 acres):	2,370	2,750	2,480	2,350	95
% of Canada	19.1	20.3	17.9	19.4	
Harvested Area ('000 acres):	2,280	2,730	2,460	2,310	94
Yield/acre (bushels):	28.9	29.1	30.6	28.4	93
Production (million bu):	66.0	79.5	75.3	65.6	87
% of Canada	24.2	23.6	19.4	20.9	
Average Price ($/bu):	8.39	7.94	5.22	5.44	104
VALUE OF PRODUCTION ($ million):	553.9	631.1	392.8	357.1	91
ESTIMATED TOTAL EXPENSES: ($/acre)	220.38	221.04	221.31	217.91	98
CASH RECEIPTS ($ million):	471.9	622.3	351.7	291.7	83
% of Canada	22.2	23.4	19.9	18.5	
EST. AV. QUALITY OF CANOLA CROP:					
1Canada - Oil content (%)	41.9	43.1	42.3	42.0	99
1Canada - Protein content (%)	22.1	21.6	21.7	22.0	101
2Canada - Oil content (%)	41.0	42.2	41.3	41.3	100
2Canada - Protein content (%)	23.0	22.4	22.5	22.6	100
3Canada - Oil content (%)	40.8	44.4	42.1	41.5	99
3Canada - Protein content (%)	23.1	22.8	21.7	22.4	103
CROP DISPOSITION (million bu):	68.2	79.9	78.8	76.6	97
Marketings	62.3	69.7	62.5	65.6	105
Seed Requirements	0.4	0.3	0.3	0.3	100
Feed, Waste & Dockage	5.1	6.4	5.0	5.9	118
Carryover, July 31	0.4	3.5	11.0	4.8	44
EXPORTS ($ million):	542.9	999.2	625.8	448.2	72
Unprocessed	278.3	454.7	345.9	296.6	86
Processed	264.6	544.5	279.9	151.6	54
IMPORTS ($ million):	21.7	44.6	53.2	38.6	73
Unprocessed	17.1	33.6	43.2	30.4	70
Processed	4.6	11.0	10.0	8.2	83

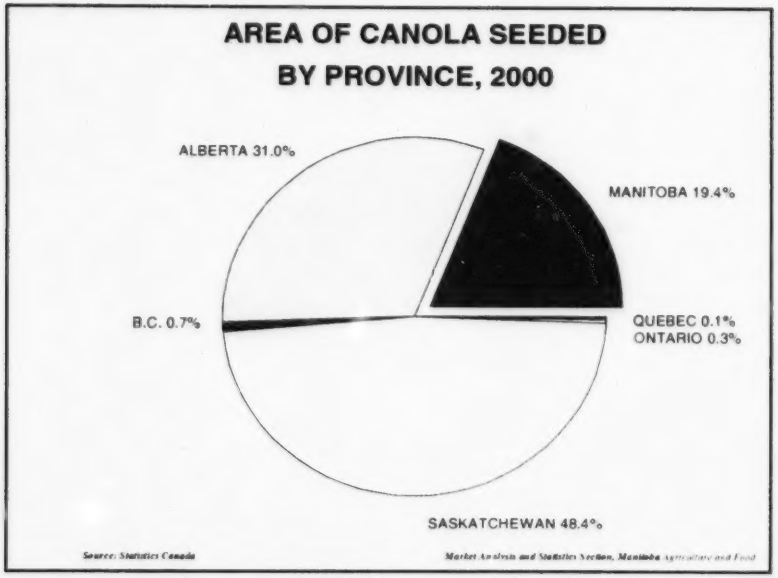
CANOLA INDUSTRY CHART, 2000

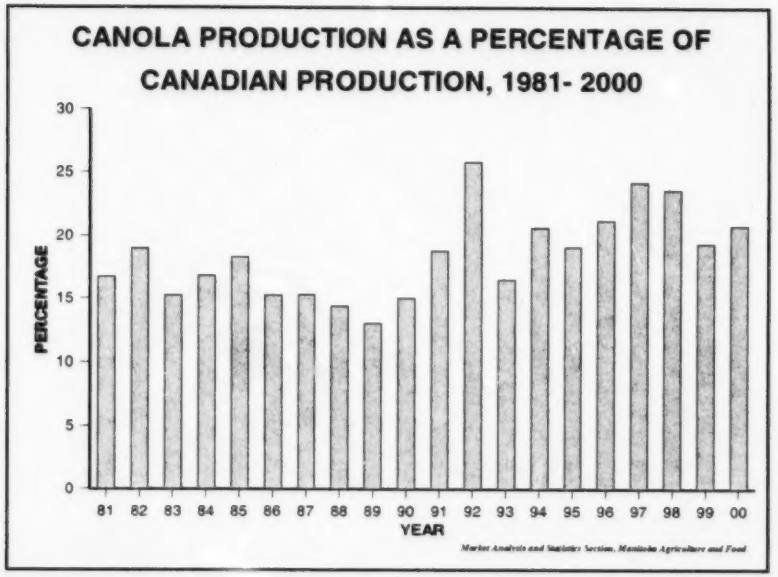


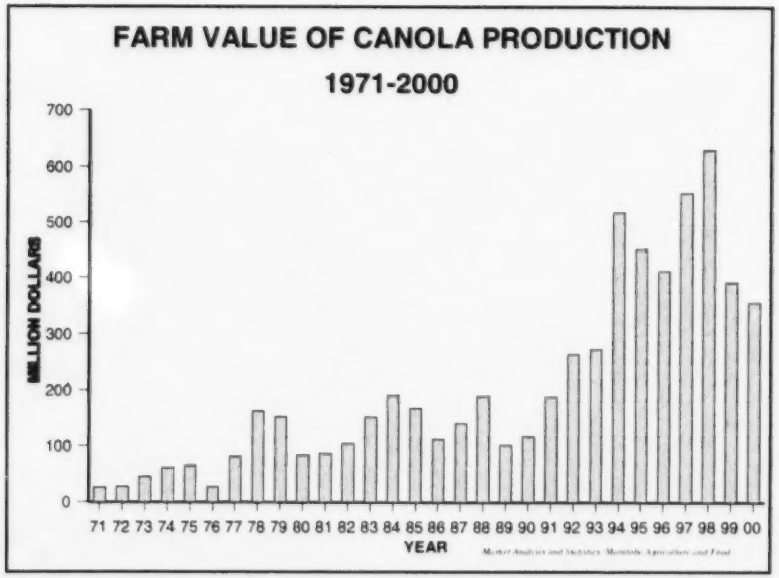
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

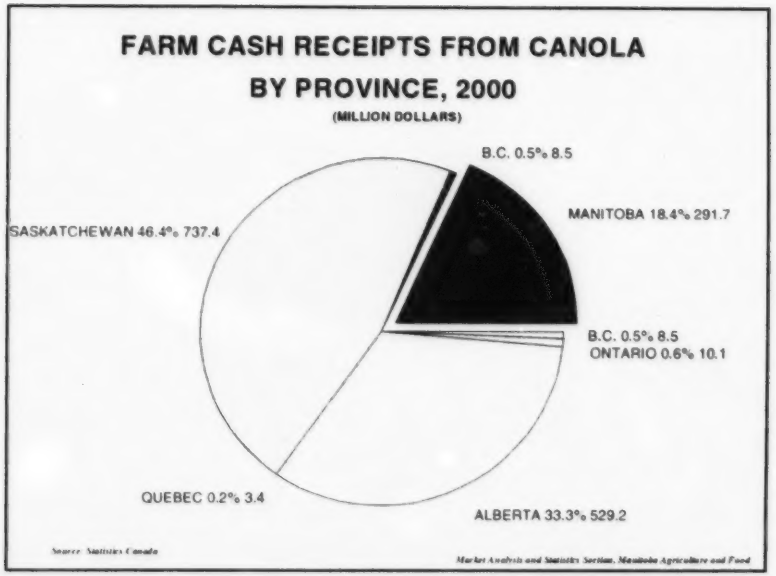

SEEDED & HARVESTED AREA OF CANOLA
BY YEAR, 1981- 2000
SEEDED
HARVESTED
AREA (000 ACRES)
3500
3000
2500
2000
1500
1000
500
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

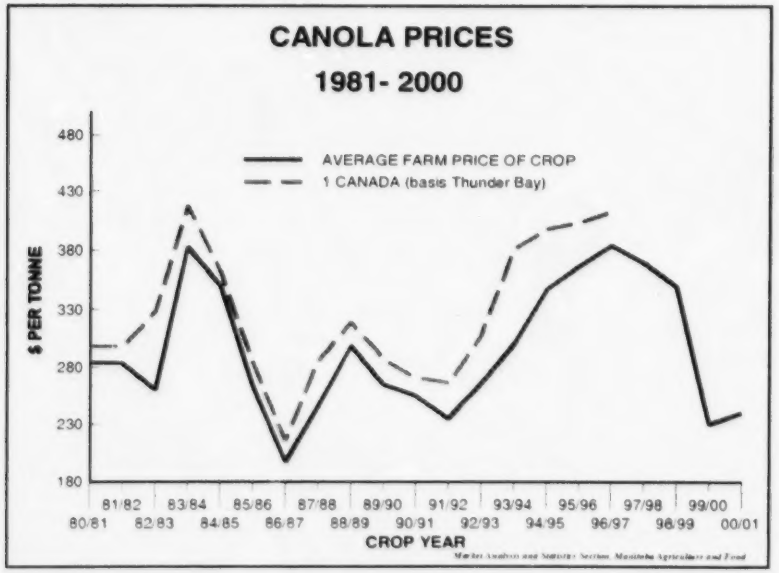

SEEDED AREA OF CANOLA
BY AGRICULTURAL REGION, 1997- 2000
1997
1998
1999
2000
AREA (000 ACRES)
700
600
500
400
300
200
100
0
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food

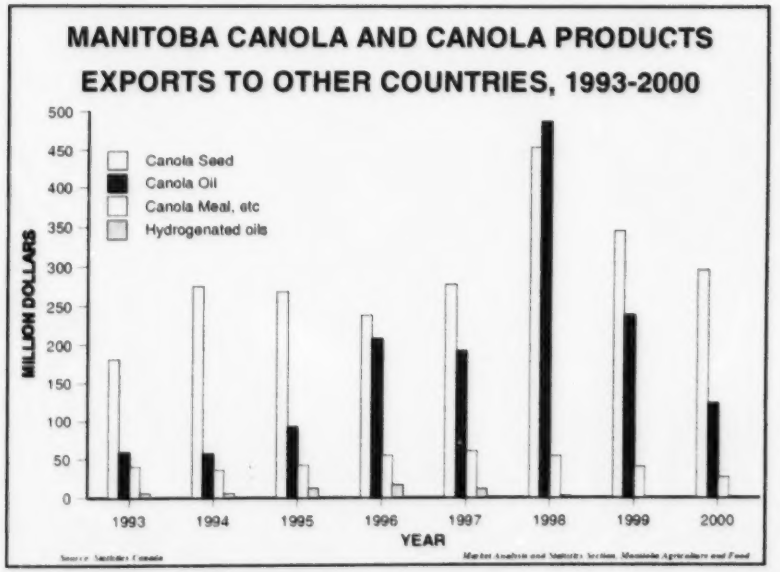

AREA OF CANOLA SEEDED
BY PROVINCE, 2000
ALBERTA 31.0%
MANITOBA 19.4%
B.C. 0.7%
QUEBEC 0.1%
ONTARIO 0.3%
SASKATCHEWAN 48.4%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

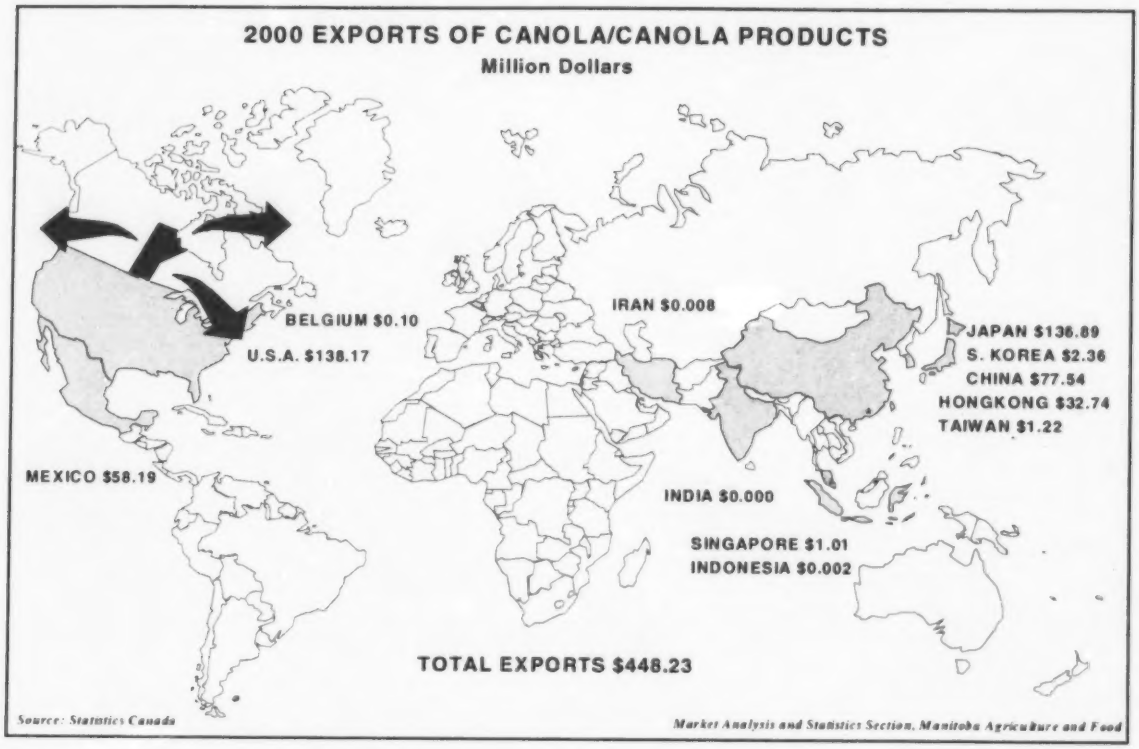

CANOLA PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981- 2000
PERCENTAGE
30
25
20
15
10
5
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

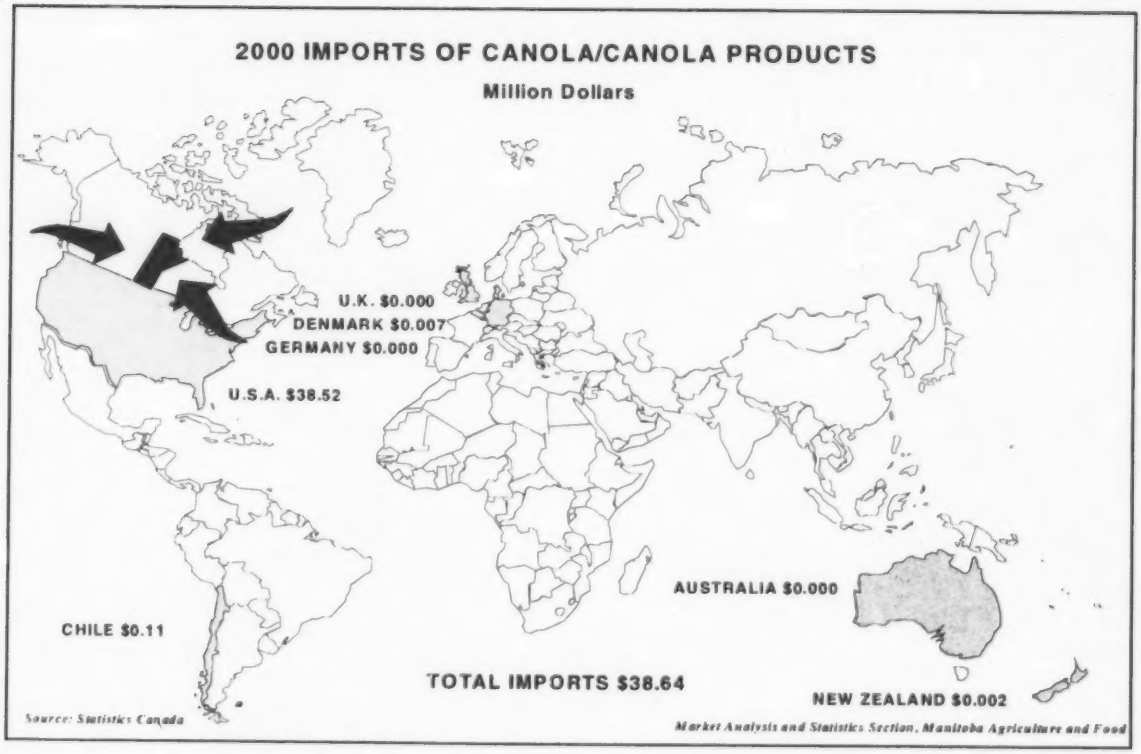

FARM VALUE OF CANOLA PRODUCTION
1971-2000
MILLION DOLLARS
700
600
500
400
300
200
100
0
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


FARM CASH RECEIPTS FROM CANOLA
BY PROVINCE, 2000
(MILLION DOLLARS)
B.C. 0.5% 8.5
MANITOBA 18.4% 291.7
SASKATCHEWAN 46.4% 737.4
B.C. 0.5% 8.5
ONTARIO 0.6% 10.1
QUEBEC 0.2% 3.4
ALBERTA 33.3% 529.2

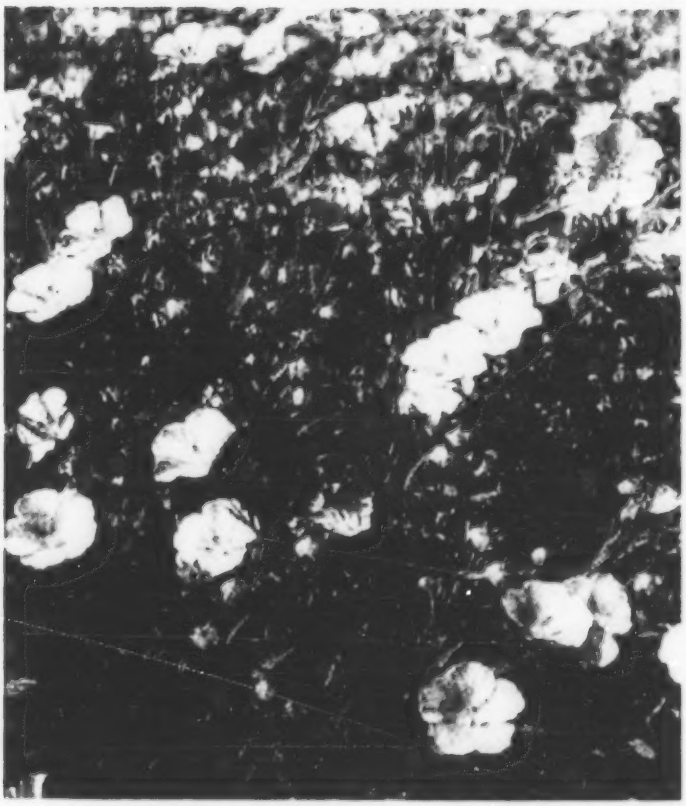

CANOLA PRICES
1981- 2000
AVERAGE FARM PRICE OF CROP
1 CANADA (basis Thunder Bay)
$ PER TONNE
480
430
380
330
280
230
180
81/82 83/84 85/86 87/88 89/90 91/92 93/94 95/96 97/98 99/00
80/81 82/83 84/85 86/87 88/89 90/91 92/93 94/95 96/97 98/99 00/01
CROP YEAR


MANITOBA CANOLA AND CANOLA PRODUCTS
EXPORTS TO OTHER COUNTRIES, 1993-2000
Canola Seed
Canola Oil
Canola Meal, etc
Hydrogenated oils
MILLION DOLLARS
500
450
400
350
300
250
200
150
100
50
0
1993 1994 1995 1996 1997 1998 1999 2000
YEAR


2000 EXPORTS OF CANOLA/CANOLA PRODUCTS
Million Dollars
BELGIUM $0.10
U.S.A. $138.17
MEXICO $58.19
IRAN $0.008
INDIA $0.000
SINGAPORE $1.01
INDONESIA $0.002
JAPAN $136.89
S. KOREA $2.36
CHINA $77.54
HONGKONG $32.74
TAIWAN $1.22
TOTAL EXPORTS $448.23
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF CANOLA/CANOLA PRODUCTS
Million Dollars
U.K. $0.000
DENMARK $0.007
GERMANY $0.000
U.S.A. $38.52
CHILE $0.11
AUSTRALIA $0.000
NEW ZEALAND $0.002
TOTAL IMPORTS $38.64
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

FLAXSEED SECTOR



FLAXSEED SECTOR PROFILE

Production:

One of three provinces producing flaxseed, Manitoba has been growing the crop since the late 1800s. Flaxseed only became a significant alternative to grains in the years following World War II when as much as one million acres were planted. The seeded area peaked in 1965 at 1.35 million acres and has fluctuated over the past thirty years from a low of 370,000 acres in 1992 to a high of 1.25 million acres in 1979. In 2000, lower prices led to only 435,000 acres of flaxseed being planted and 430,000 acres harvested. Flaxseed production of 8.1 million bushels in 2000 was 24 percent lower than in 1999 and 63 percent less than the 1985 record of 22 million bushels. Manitoba contributed 29.7 percent of the Canadian flaxseed crop in 2000, down from 62.4 percent in 1992, when Manitoba was the largest producing province in Canada.

Yields averaged 18.8 bushels per acre in 2000, below the 1999 and 10-year average of 21.4 bushels per acre. The largest average yield on record was 25.0 bushels per acre in 1996.

The average price of flaxseed rose from $4.00 per bushel for the 1991 crop to $8.51 for the 1996 crop, but declined in each of the next three years to $5.08 per bushel for the 1999 crop. The 2000 price was slightly higher at $5.89 per bushel. This was well below the 1974 record of $9.56 per bushel. Due to reduced production, the value of the flaxseed crop declined by 14 percent from $55.4 million in 1999 to $47.7 million in 2000. The value of the flaxseed crop peaked in 1985 at $148 million. Estimated farm expenses for flaxseed production, including operating, labour and fixed costs, rose yearly from $140.03 per acre in 1992 to $165.9 in 1999, but fell in 2000 to $164.4 per acre.

Marketing:

Annual cash receipts from flaxseed marketings rose from $88.7 million in 1996 to $135.5 million in 1997, but declined to $93.4 million in 1998 and $47.7 million in 2000. Manitoba's contribution to Canadian flaxseed receipts fell from 46.1 percent in 1997 to 30.6 percent in 2000. The 2000 flaxseed crop averaged about 43.7 percent oil and 22.4 percent protein, with a particularly high-quality oil containing 57.5 percent linolenic. Flaxseed marketings decreased from 14.5 million bushels in 1997/98 to 7.2 million bushels in 2000/01. Flaxseed carryover increased from none at the end of 1997/98 to 2.2 million bushels at the end of the 1999/2000 crop year, but fell to 1.4 bushels on July 31, 2001.

Processing:

Manitoba grows a high-quality, high-linolenic-content crop, which is favourable both for drying (polymerization) and health foods (omega-3). The province also grows a small area of low-linolenic, yellow-seeded flaxseed (solin) for oil, or for confectionery use in competition with sesame seed, mainly in Europe.

Flaxseed is processed into a variety of diverse products from breads to linseed oil for paints and concrete preservation to linoleum. Some processing has occurred from year to year at the CanAmera plants in Altona and Harrowby. Pizzey's Milling and Baking Co. at Angusville produces ground flax products, such as breads, muffins and pancake mixes.

Straw fibre, tow and waste, valued at $23 million in 2000, generally are used for industrial purposes, while135,000 tons of flax straw, valued at about $0.7 million in 2000, is used for fine papers for cigarettes and currency.

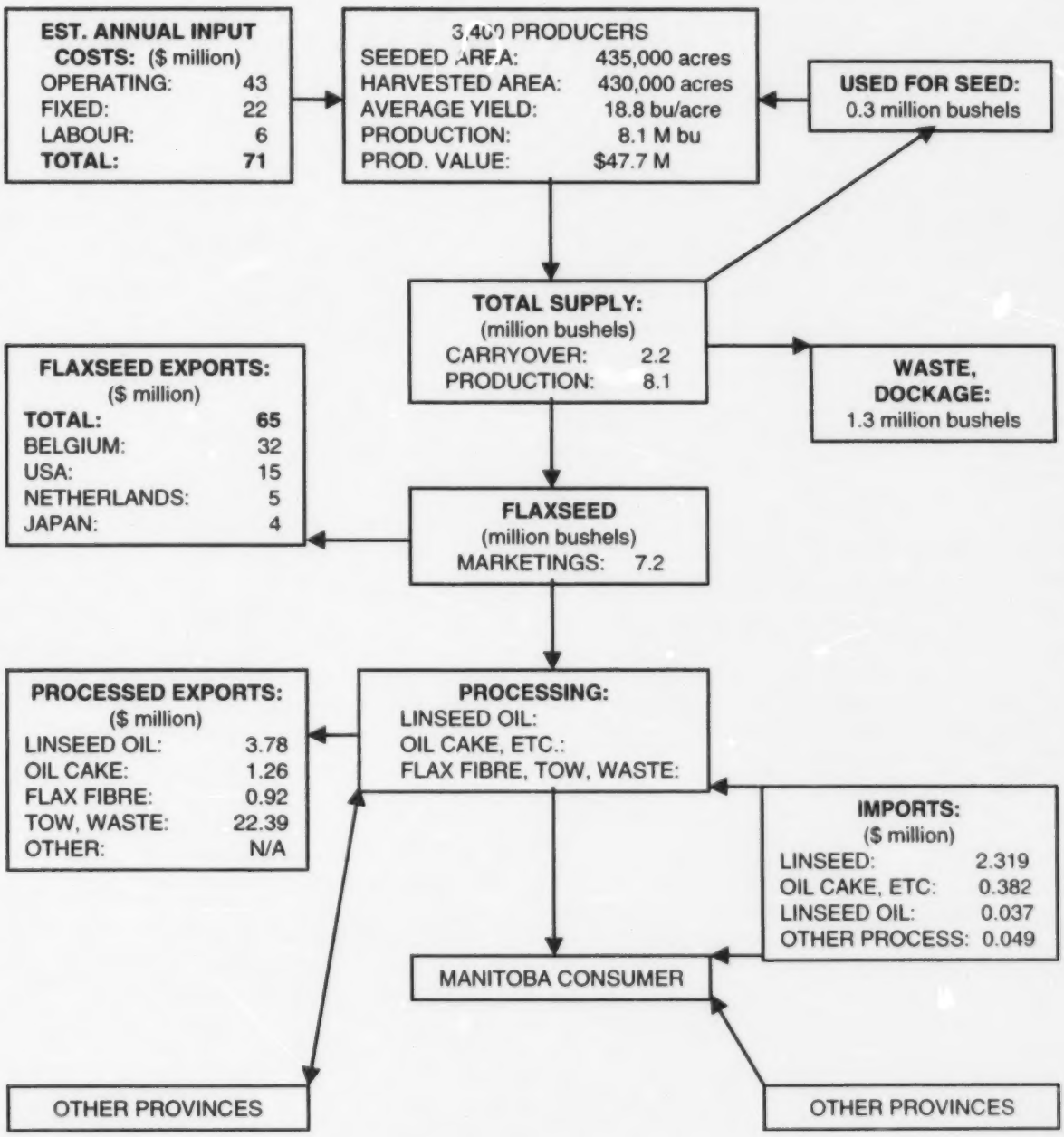
Trade:

Manitoba exported flaxseed, valued at $64.8 million in 2000, to 36 countries, such as Belgium, U.S.A, Japan and Netherlands. Linseed oil exports totalled $3.8 million in 2000, while oil-cake exports were valued at $1.3 million. Exports of flax fibre, tow and waste totalled $23.3 million. Flaxseed imports increased from $0.47 million in 1999 to $2.3 million in 2000. Imports of oil cake and linseed oil respectively were valued at $0.38 and $0.04 million in 2000.

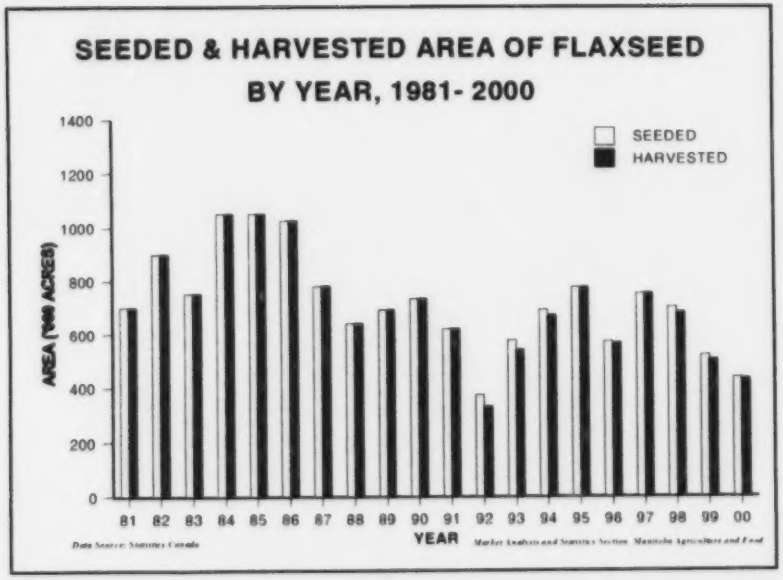
FLAXSEED AND FLAXSEED PRODUCTS SECTOR

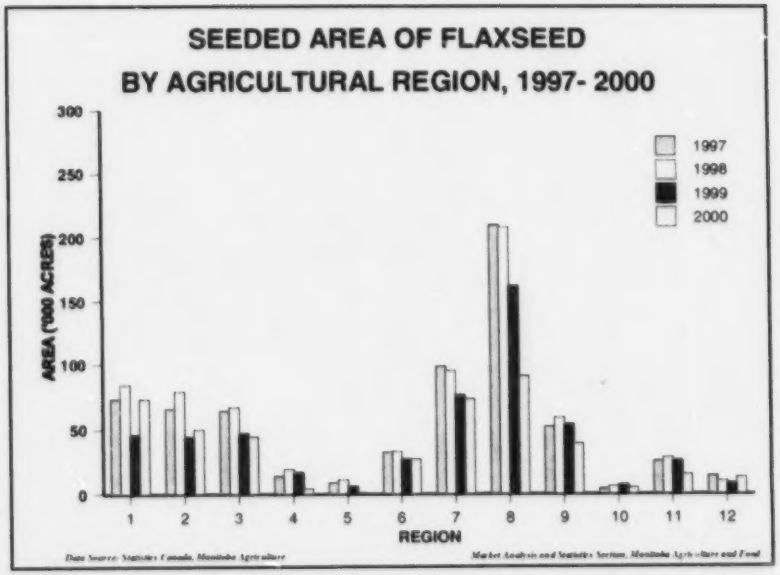
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	4,500	4,400	4,000	3,400	85
CROP PRODUCTION:					
Seeded Area ('000 acres):	750	700	520	435	84
% of Canada	36.4	32.3	26.0	29.6	
Harvested Area ('000 acres):	750	680	500	430	86
Yield/acre (bushels):	21.3	20.9	21.4	18.8	88
Production (million bu):	16.0	14.2	10.7	8.1	76
% of Canada	42.1	33.3	25.9	29.7	
Average Price ($/bu):	8.38	7.75	5.08	5.89	116
VALUE OF PRODUCTION ($ million):	134.1	110.0	55.4	47.7	86
ESTIMATED TOTAL EXPENSES ($/acre):	157.3	158.8	165.9	164.4	99
CASH RECEIPTS ($ million):	135.5	93.4	43.6	47.7	109
% of Canada	46.1	35.4	33.4	30.6	
EST. AV. QUALITY OF FLAXSEED CROP:					
1Canada Flaxseed Varieties:					
- Oil content (%)	43.9	43.4	43.7	43.7	100
- Protein content (%)	23.1	23.1	22.4	22.4	100
- Fatty acid content of oil (%) -Linoleic	14.7	14.1	14.3	14.3	100
- Fatty acid content of oil (%) -Linolenic	58.8	57.2	60.4	57.5	95
1Canada Solin (Low-Linolenic) Varieties:					
- Oil content (%)	43.9	42.9	43.3	44.1	102
- Protein content (%)	23.4	22.4	22.0	23.2	105
- Fatty acid content of oil (%) -Linoleic	71.0	70.6	72.3	71.0	98
- Fatty acid content of oil (%) -Linolenic	2.0	1.9	2.2	2.0	91
CROP DISPOSITION (million bu):	16.4	14.2	11.7	10.3	88
Marketings	14.5	11.8	8.3	7.2	87
Seed Requirements	0.5	0.4	0.3	0.3	100
Feed, Waste & Dockage	1.3	1.0	0.9	1.3	144
Carryover, July 31	0.0	1.0	2.2	1.4	64
EXPORTS ($ million):	180.3	160.0	106.2	93.2	88
Unprocessed	143.1	123.9	73.2	64.8	89
Processed	37.2	36.1	33.0	28.3	86
IMPORTS ($ thousand):	344.1	1,201.2	505.8	2,786.7	551
Unprocessed	124.4	1,196.0	471.4	2,319.1	492
Processed	219.7	5.2	34.4	467.6	1,359

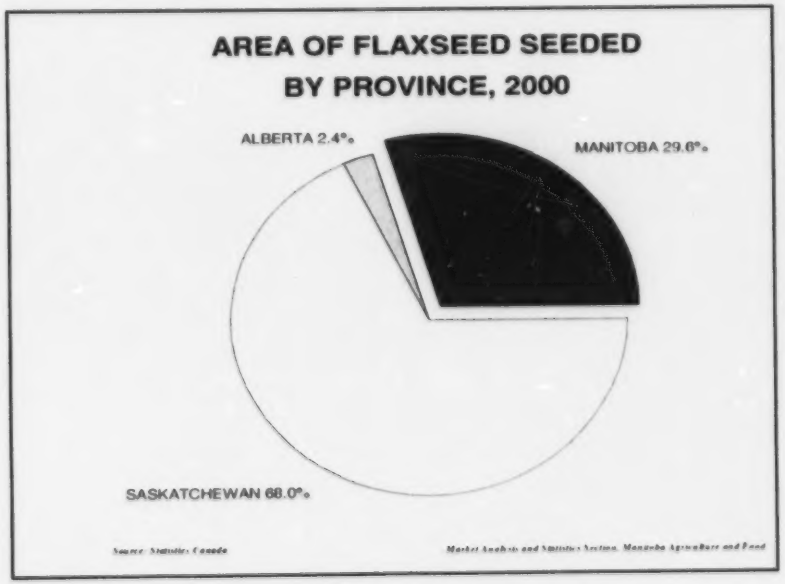
FLAXSEED INDUSTRY CHART, 2000

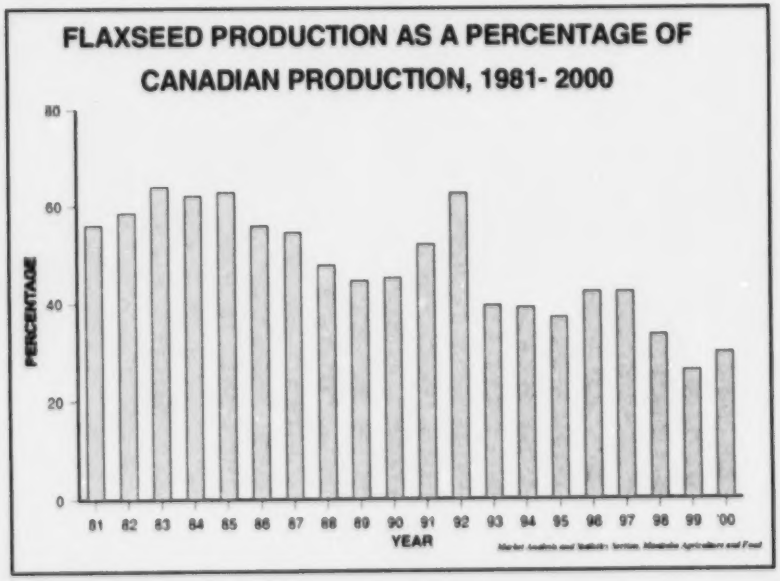


DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

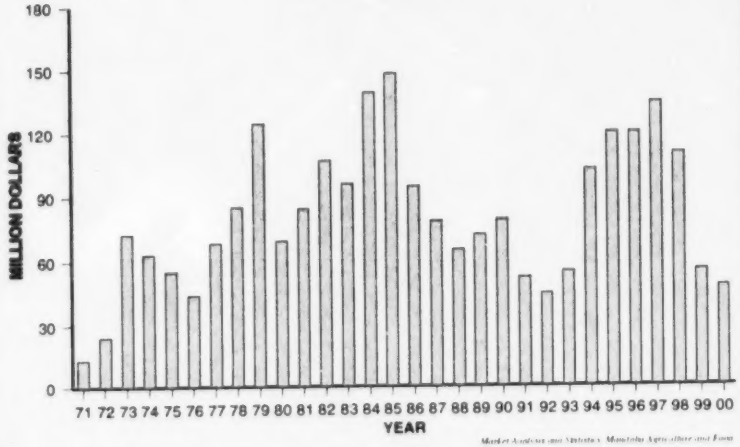

SEEDED & HARVESTED AREA OF FLAXSEED
BY YEAR, 1981- 2000
SEEDED
HARVESTED
AREA ('000 ACRES)
1400
1200
1000
800
600
400
200
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


SEEDED AREA OF FLAXSEED
BY AGRICULTURAL REGION, 1997- 2000
1997
1998
1999
2000
AREA ('000 ACRES)
300
250
200
150
100
50
0
1 2 3 4 5 6 7 8 9 10 11 12
REGION

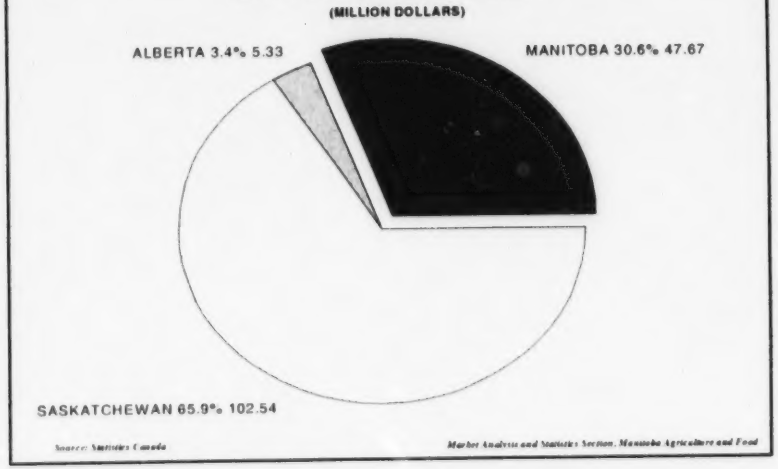

AREA OF FLAXSEED SEEDED
BY PROVINCE, 2000
ALBERTA 2.4%
MANITOBA 29.6%
SASKATCHEWAN 68.0%


FLAXSEED PRODUCTION AS A PERCENTAGE OF
CANADIAN PRODUCTION, 1981- 2000
PERCENTAGE
80
60
40
20
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00
YEAR

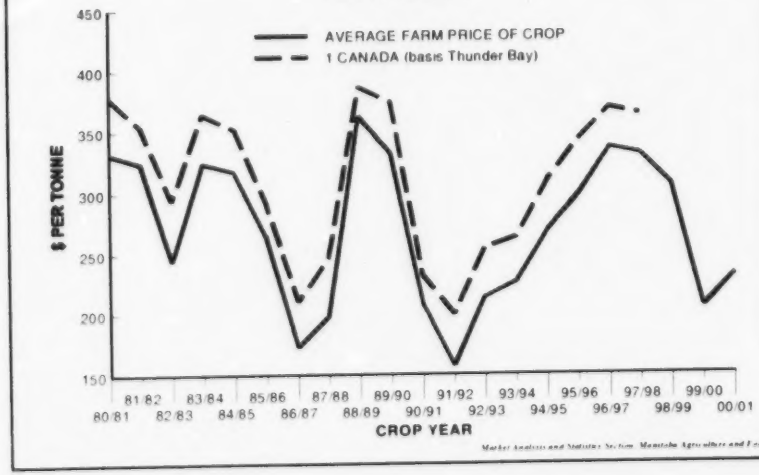
FARM VALUE OF FLAXSEED PRODUCTION 1971- 2000



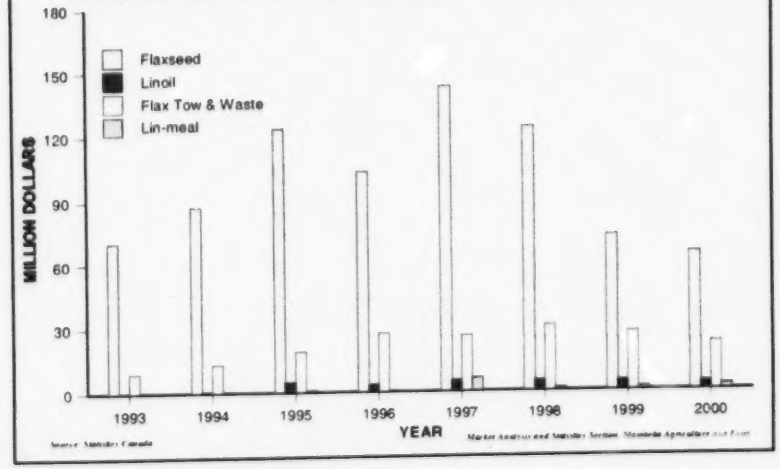
FARM CASH RECEIPTS FROM FLAXSEED BY PROVINCE, 2000



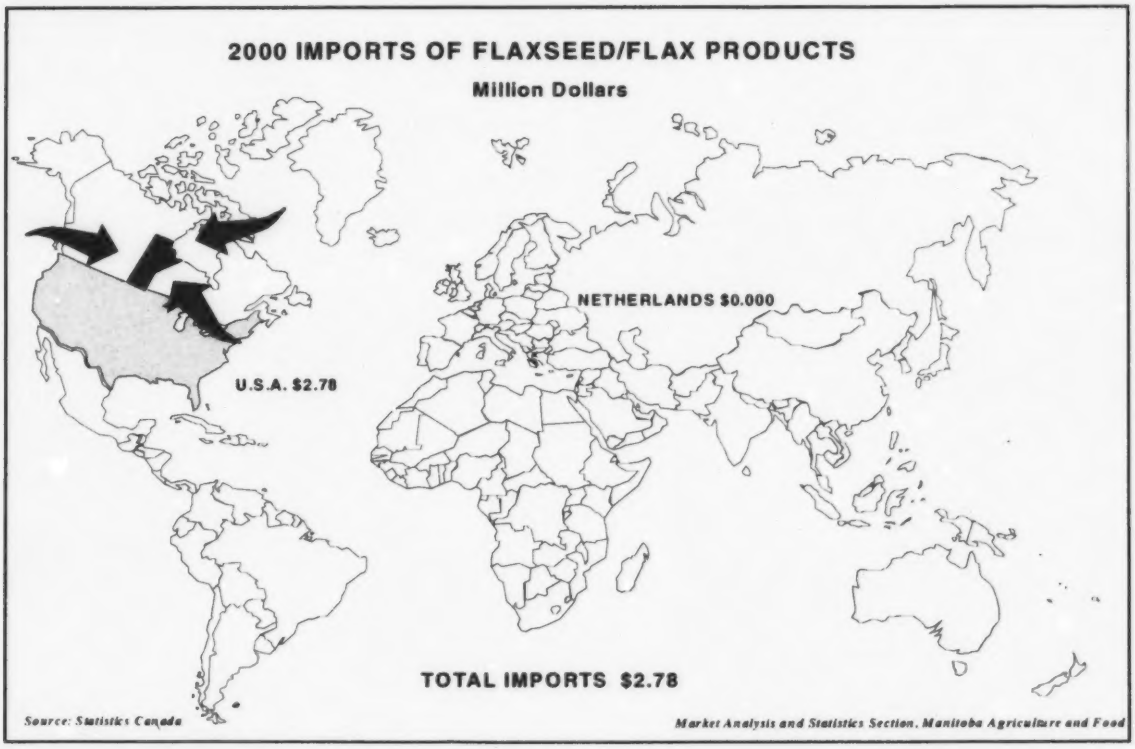
FLAXSEED PRICES 1981- 2000



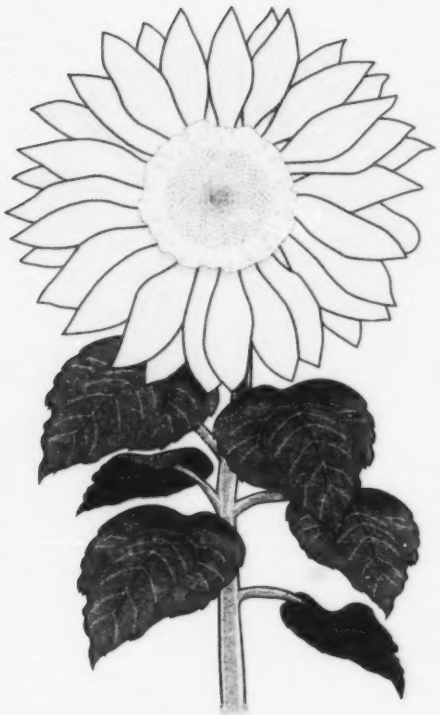
MANITOBA FLAXSEED AND FLAXSEED PRODUCT EXPORTS TO OTHER COUNTRIES, 1993- 2000



2000 EXPORTS OF FLAXSEED/FLAX PRODUCTS
Million Dollars
SWEDEN $0.11
NETHERLANDS $5.47
GERMANY $3.37
BELGIUM $33.08
ITALY $0.31
JAPAN $3.70
S. KOREA $0.49
U.S.A. $42.48
INDONESIA $0.24
MALAYSIA $0.06
MEXICO $0.21
VENEZUELA $0.05
EGYPT $3.17
NEPAL $0.08
PERU $0.04
TOTAL EXPORTS $93.18
(Top 15 of 36 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF FLAXSEED/FLAX PRODUCTS
Million Dollars
NETHERLANDS $0.000
U.S.A. $2.78
TOTAL IMPORTS $2.78
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

SUNFLOWER SEED SECTOR



SUNFLOWER SEED SECTOR PROFILE

Production:

The largest producer of the three Prairie Provinces, Manitoba has been growing sunflower seed since the early 1940s. Less than 100,000 acres were planted until 1971, when the area rose to 155,000 acres from 65,000 acres a year earlier. The seeded area peaked in 1979 at 380,000 acres, but dropped to a 15-year low of 57,000 acres in 1986 as lower prices and problems due to weather, disease and insects discouraged producers from growing sunflowers. Prices and varieties improved and the seeded area increased in the early 1990s making sunflowers a viable alternative to grains in the southern part of the province. In 2000, 155,000 acres of sunflowers were planted and 145,000 acres harvested to produce 224.5 million pounds of seed, 22.8 percent above the 1999 crop, but only 48.8 percent of the record 1979 crop of 460.0 million pounds. Manitoba produced 85.4 percent of the Canadian sunflower seed crop in 2000, down from a high of 96.0 percent in 1981.

Yields averaged 1,550 pounds per acre in 2000 compared to a 10-year average of 1,354 pounds per acre and 1,460 pounds per acre in 1999. The largest average yield on record was 1,586 pounds per acre in 1990.

The average price of sunflower seed rose from $0.10 per pound for the 1991 crop to $0.175 per pound for the 1998 crop, but decreased in 2000 to $0.125 per pound. Recent prices were well below the record of $0.205 per pound in 1974. The total value of the Manitoba sunflower seed crop peaked in 1979 at $50.6 million. The value declined from $33.2 million in 1998 to $25.8 million in 1999, but increased to $28.0 million in 2000.

Estimated farm expenses for sunflower seed production, including operating, labour and fixed costs, decreased from $218.61 per acre in 1999 to $207.20 per acre in 2000.

Marketing:

Annual cash receipts from sunflower seed marketings rose from $12.4 million in 1997 to $24.3 million in 2000. Manitoba's share of Canadian sunflower seed receipts fell from 89.9 percent in 1992 to 67.0 percent in 1996, but rose to 77.7 percent in 2000. In 2000, about 90 percent of sunflower seed production was of larger seed types used for confectionery or bird feed with the remainder comprised of oil types for crushing. This was a reversal of historic patterns when oil was the major product.

Processing:

Sunflower seeds are processed into oil, roasted and salted or baked into bread products for human consumption. The residual oil-cake or high-protein meal is used for animal feed. Crushing has occurred periodically at the CanAmera plant in Altona. Companies, such as Superior Harvest Foods and Sunny Day Products in Winkler, Nestibo Agra in Deloraine, Snow Fire Seeds in Domain and Scott Bathgate, Tasty Seeds and United Grain Growers in Winnipeg, have processed confectionery seed. Both confectionery types (15%) and oil types (85%) are cleaned and/or mixed with other seeds and bagged for bird feed.

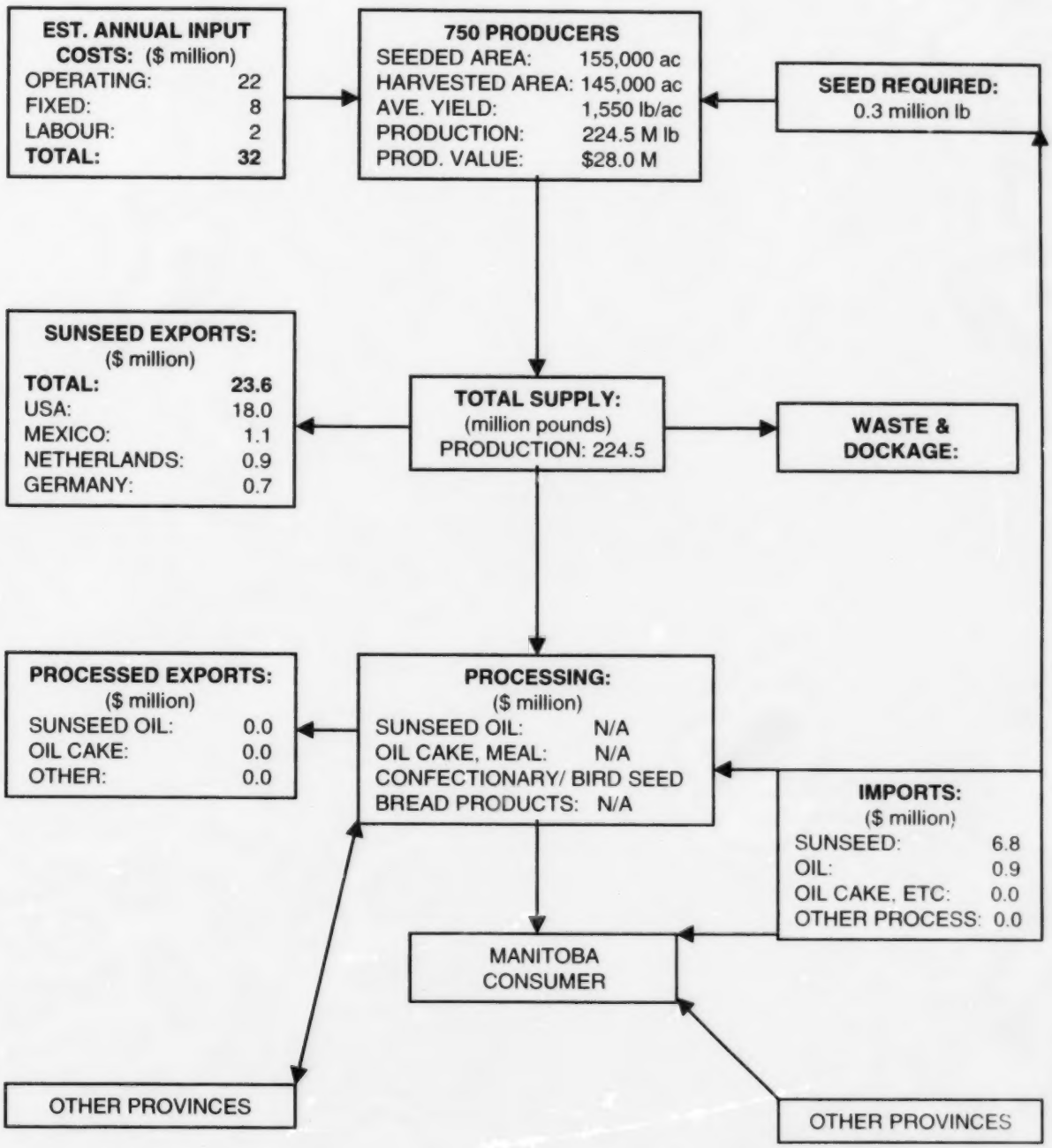
Trade:

Manitoba exported sunflower seed valued at $23.6 million in 2000 to 31 countries, such as U.S.A., Mexico, The Netherlands and Germany. Due to limited crushing in the province, there were no sun-oil exports in the past six years except in 1997 where there were $10,600 of sun-oil exports. Oil-cake exports amounted to $39,000 in 1998, but there were none in 1999 and 2000. Seed may be imported from the United States for planting purposes or to meet processors needs. In 2000, seed imports totalled $6.8 million. Imports of oil came mainly from the United States and were valued at $0.9 million in 2000.

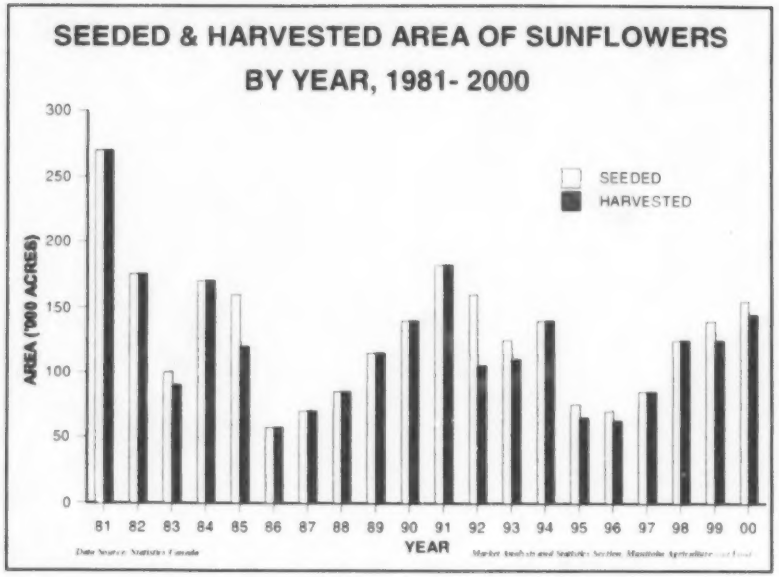
SUNFLOWER AND SUNFLOWER PRODUCTS SECTOR

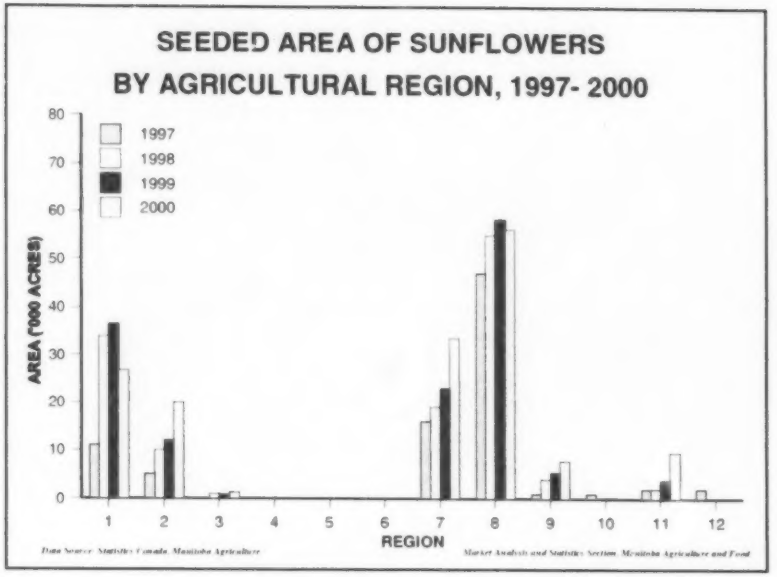
	1997	1998	1999	2000[P]	'00 as a % of '99
Estimated Number of Farms	400	600	700	750	107
CROP PRODUCTION:					
Seeded Area ('000 acres):	85	125	140	155	111
% of Canada	68.0	73.5	66.7	83.8	
Harvested Area ('000 acres):	85	125	125	145	116
Yield/acre (pounds)	1,235	1,520	1,460	1,548	106
Production (million pounds):	104.9	190.0	182.8	224.5	123
% of Canada	73.2	77.1	68.0	85.4	
Average Price ($/pound):	0.146	0.175	0.140	0.125	89
VALUE OF PRODUCTION ($ million):	15.3	33.2	25.8	28.0	109
ESTIMATED TOTAL EXPENSES: ($/acre)	175.50	188.35	218.61	207.20	95
CASH RECEIPTS ($ million):	12.4	19.7	22.2	24.3	109
% of Canada	72.3	75.0	73.5	77.7	
EXPORTS ($ million):	15.6	23.8	20.7	23.6	114
Sunflower seed	15.5	23.8	20.7	23.6	114
Processed (oil, oil-cake, bird seed, etc.)	0.08	0.04	0	0	0
IMPORTS ($ million):	5.2	6.5	10.3	7.7	75
Sunflower seed	4.6	5.8	9.4	6.8	72
Processed (oil, oil-cake)	0.6	0.7	0.8	0.9	113

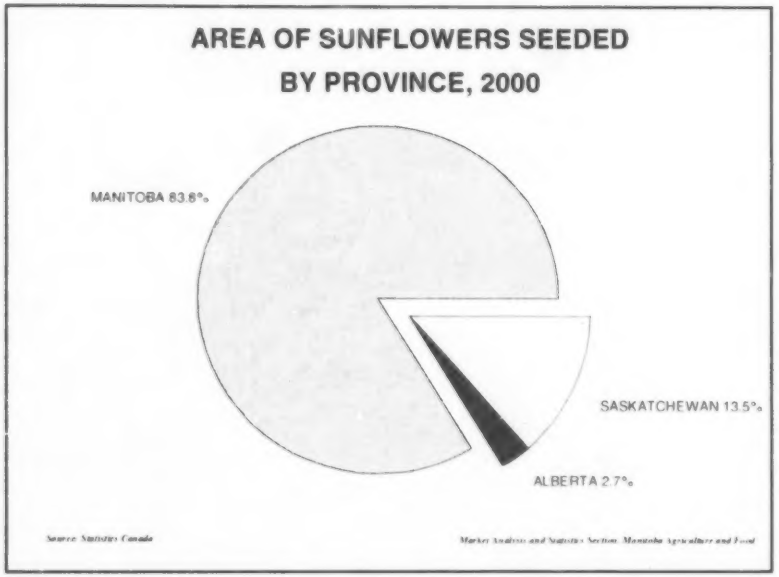
SUNFLOWER SEED INDUSTRY CHART, 2000

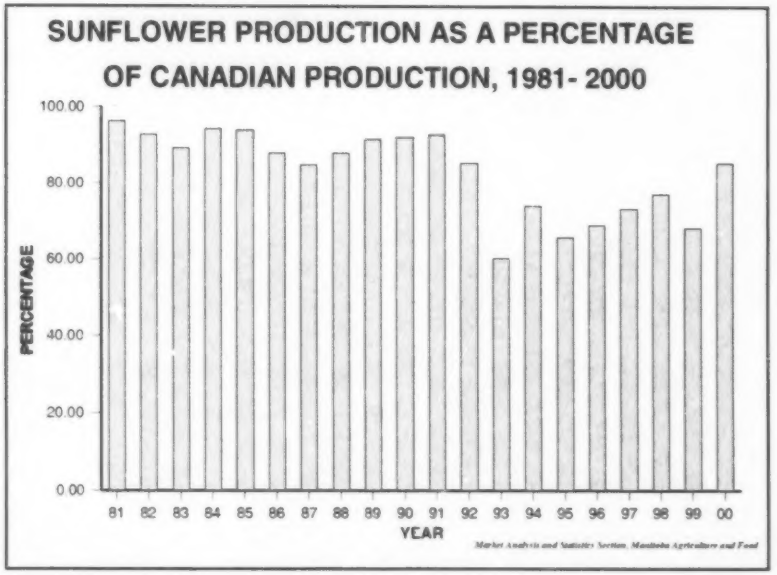


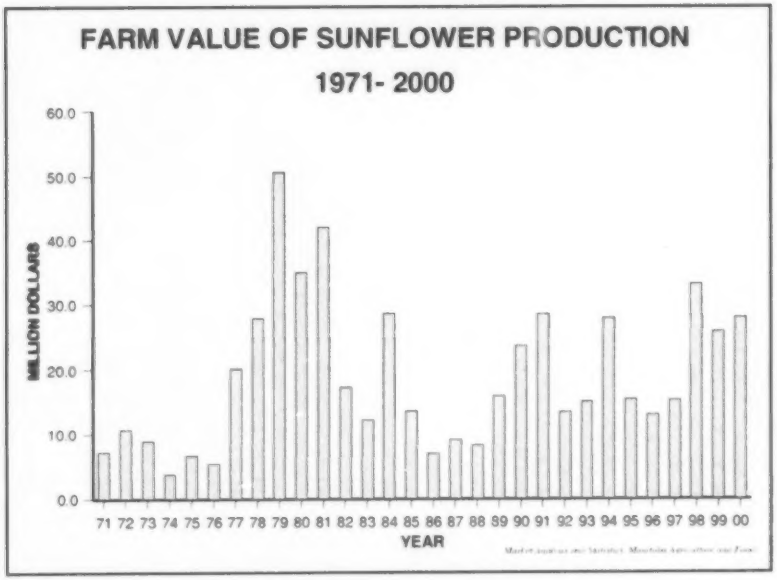
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada

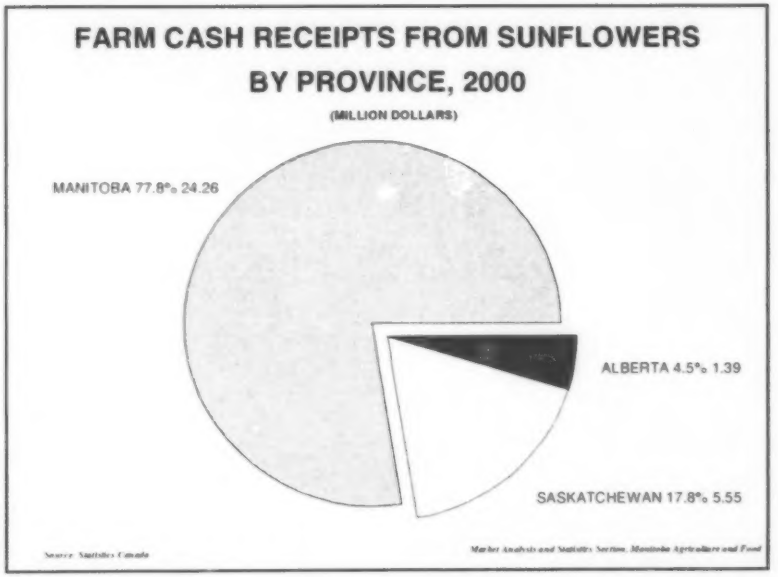

SEEDED & HARVESTED AREA OF SUNFLOWERS
BY YEAR, 1981- 2000
AREA ('000 ACRES)
300
250
200
150
100
50
0
SEEDED
HARVESTED
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Data Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

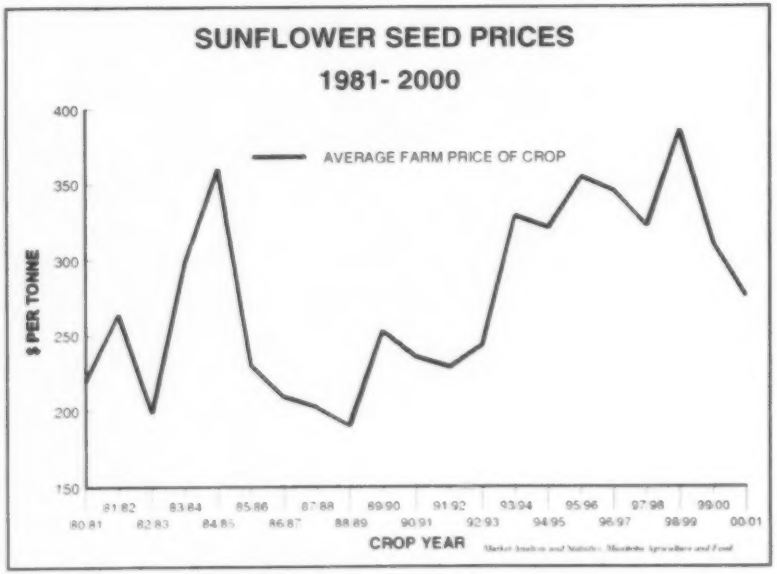

SEEDED AREA OF SUNFLOWERS
BY AGRICULTURAL REGION, 1997- 2000
AREA ('000 ACRES)
80
70
60
50
40
30
20
10
0
1997
1998
1999
2000
1 2 3 4 5 6 7 8 9 10 11 12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture and Food

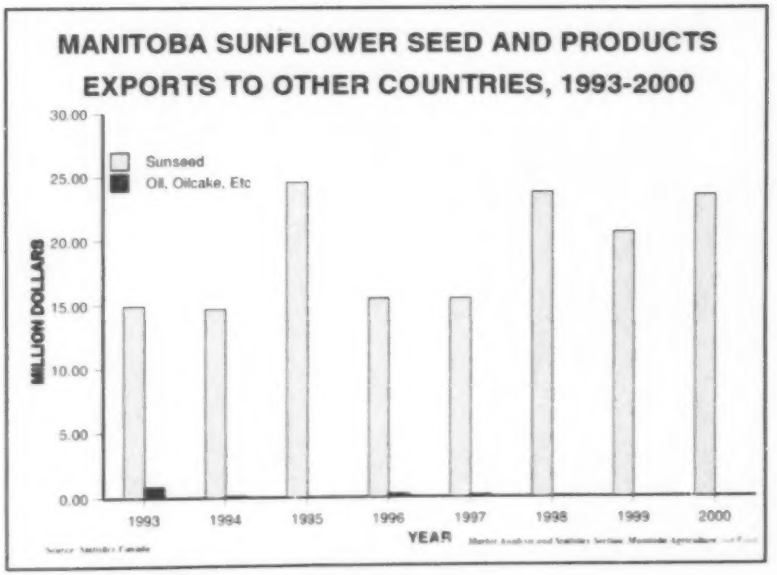

AREA OF SUNFLOWERS SEEDED
BY PROVINCE, 2000
MANITOBA 83.8%
SASKATCHEWAN 13.5%
ALBERTA 2.7%
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

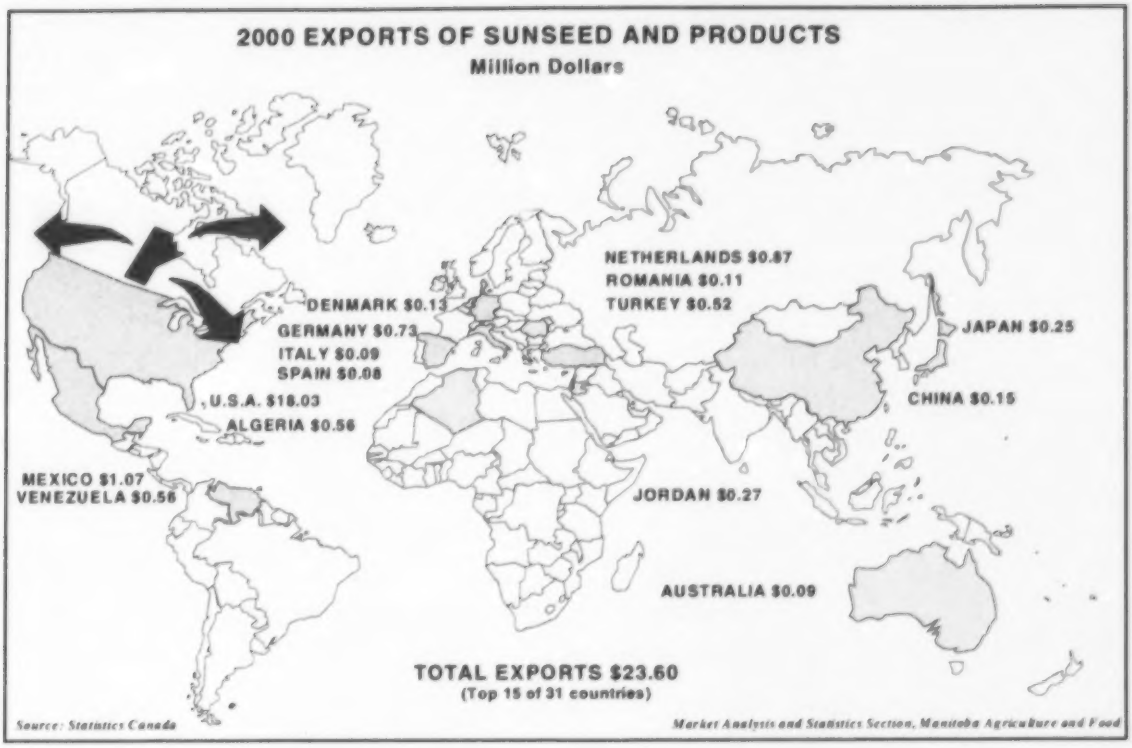

SUNFLOWER PRODUCTION AS A PERCENTAGE
OF CANADIAN PRODUCTION, 1981- 2000
PERCENTAGE
100.00
80.00
60.00
40.00
20.00
0.00
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture and Food

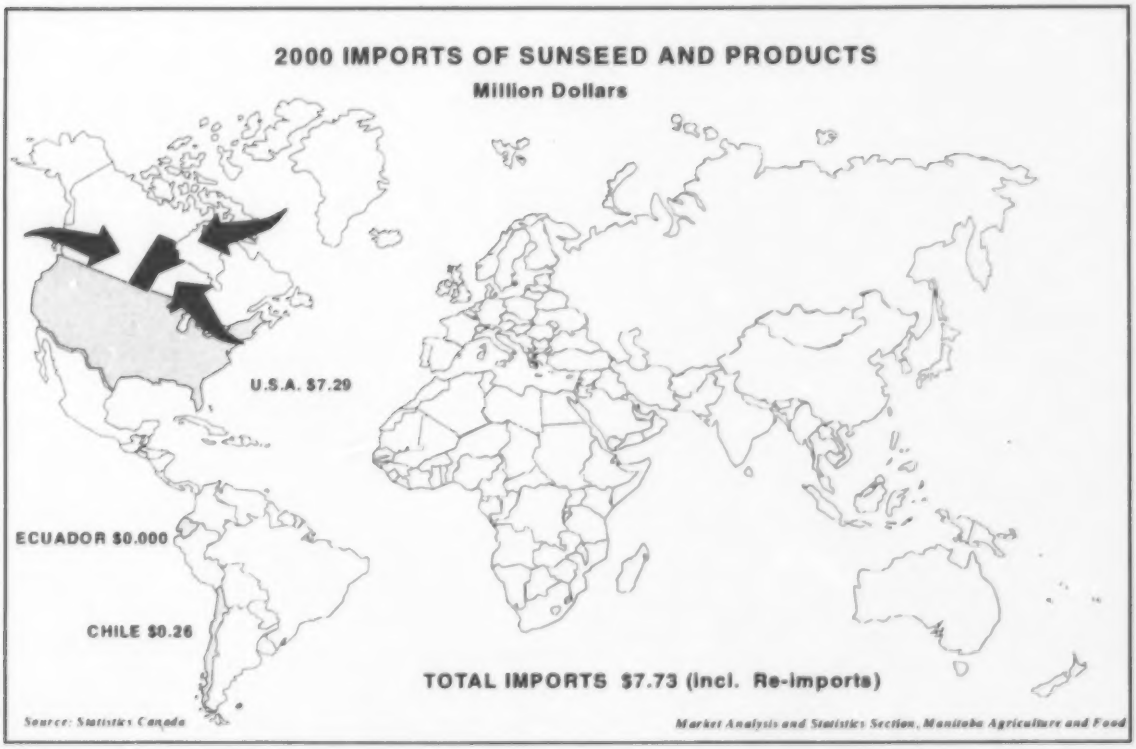

FARM VALUE OF SUNFLOWER PRODUCTION
1971- 2000
MILLION DOLLARS
60.0
50.0
40.0
30.0
20.0
10.0
0.0
71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
YEAR


FARM CASH RECEIPTS FROM SUNFLOWERS
BY PROVINCE, 2000
(MILLION DOLLARS)
MANITOBA 77.8% 24.26
ALBERTA 4.5% 1.39
SASKATCHEWAN 17.8% 5.55


SUNFLOWER SEED PRICES
1981- 2000
AVERAGE FARM PRICE OF CROP
$ PER TONNE
400
350
300
250
200
150
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00
80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 00 01
CROP YEAR


MANITOBA SUNFLOWER SEED AND PRODUCTS
EXPORTS TO OTHER COUNTRIES, 1993-2000
Sunseed
Oil, Oilcake, Etc
MILLION DOLLARS
30.00
25.00
20.00
15.00
10.00
5.00
0.00
1993
1994
1995
1996
1997
1998
1999
2000
YEAR


2000 EXPORTS OF SUNSEED AND PRODUCTS
Million Dollars
NETHERLANDS $0.87
ROMANIA $0.11
TURKEY $0.52
DENMARK $0.13
GERMANY $0.73
ITALY $0.09
SPAIN $0.08
JAPAN $0.25
U.S.A. $18.03
ALGERIA $0.56
CHINA $0.15
MEXICO $1.07
VENEZUELA $0.58
JORDAN $0.27
AUSTRALIA $0.09
TOTAL EXPORTS $23.60
(Top 15 of 31 countries)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF SUNSEED AND PRODUCTS
Million Dollars
U.S.A. $7.29
ECUADOR $0.000
CHILE $0.26
TOTAL IMPORTS $7.73 (incl. Re-imports)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food